9. Participant Folder

9.1 Participant Folder

The Participant Folder is a view of the applicant or participant information. The system performs the same way whether the information is for an applicant or a participant, except where explicitly noted in the documentation.

Performing one of the following user actions opens a Participant Folder:

- Double-clicking on a participant record displayed in the Participant List
- Highlight a record in the Participant List and select the Open Participant Folder menu item on the Participant List menu.
- Highlight a record in the Participant List and select the Open Folder toolbar button
- Select a participant from the Work with Another Household Member menu item on the Participant Activities menu (see Work with Another Household Member as defined in Common Interface Panels, Chapter B – Work with Another Household Member.)
- Select the Open Participant Folder radio button on the Applicant Prescreening dialog defined in Clinic, Chapter 07 – Initial Contact.

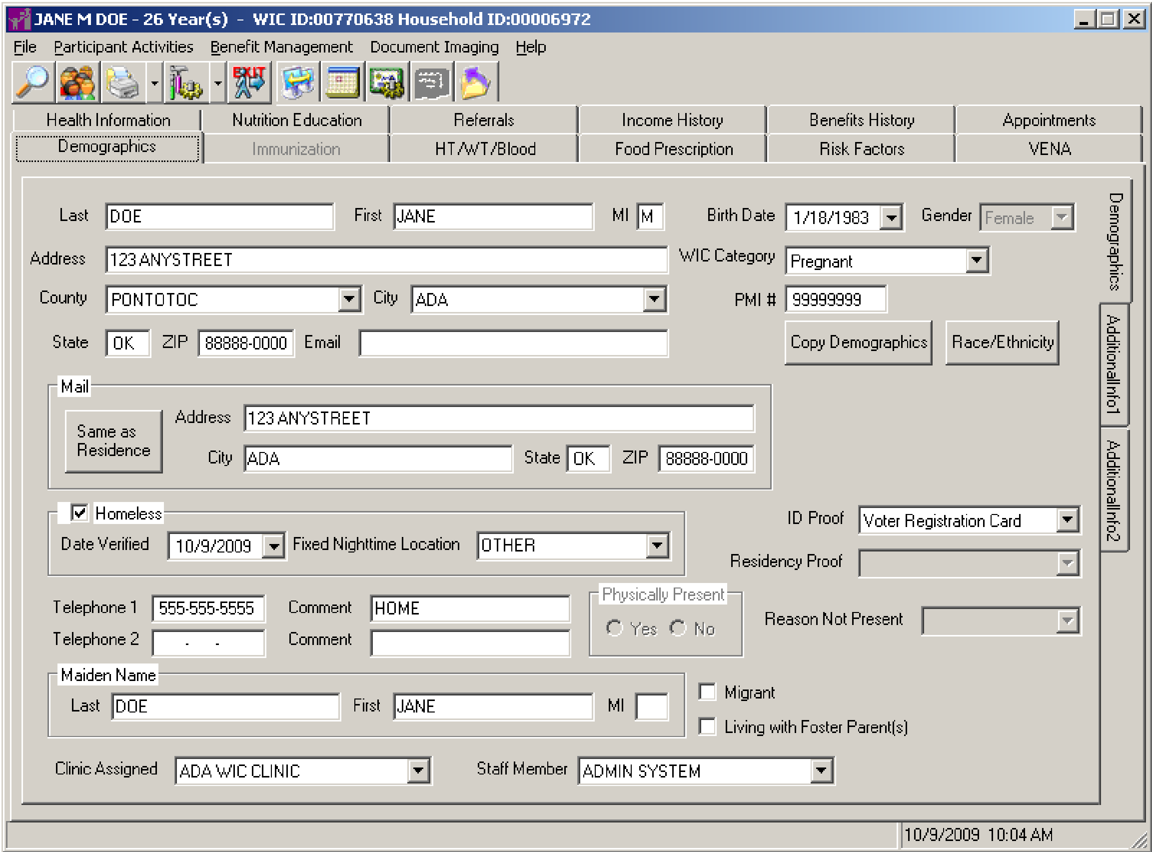


Figure 1 – Participant Folder

9.1.1 Initializing the Interface

Upon opening a Participant Folder, the system verifies if there is a certification in progress. If at least one certification is started and not completed, the controls on all Folder Tabs are locked and updating is not allowed until the Certification has been completed. This applies if a record exists for the StateWICID in the CertContact table and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

Upon initial display, set the title bar text to "Member.FirstName Member.MiddleInitial Member.LastName – Descriptive Value of Age – WIC ID: Member.StateWICID Household ID: Member.HouseholdID"

Descriptive Value of Age
For "Infant" display "XX" Months "XX" Days, calculated from the Date of Birth.
For "Child" display "XX" Year(s) "XX" Months "XX" Days calculated from the Date of Birth
For "Pregnant" display "XX" weeks gestation calculated from LMP
For "Breastfeeding" and "Non-breastfeeding" display "XX" Years calculated from the Date of Birth

If the participant or a member of the participant's household is flagged for an Alert, upon opening the participant's folder, the Display Alerts dialog defined in Common Interface Panels Chapter C – Display Alerts for Household Member is invoked.

If the participant was certified with a pending ID proof selection, upon opening the participant's folder, the Display Alerts dialog defined in Common Interface Panels, Chapter C – Display Alerts for Household Member is invoked with a "Pending ID Proof" alert.

The default tab displayed when the Participant Folder is opened is the first available tab for which the user is granted permission. Refer to Security. When the user has "View Only" permission for a specified tab of the Participant Folder, controls on the specified tab are read-only and the values cannot be modified. When the user permissions are set to "None" for a specified tab, the tab is disabled and not available for selection. The following is a list of folder tabs available and the order in which the default and user permissions are verified when a participant folder is open:

Tab
Demographics
Height/Weight/Blood (HT\WT\Blood)
VENA
Risk Factors
Food Prescription
Nutrition Education
Benefits History
Immunizations
Referrals
Health Information tab [Infant/Child]
Health Information tab [Woman]
Income History
Appointments
Certification History (if the CLN_ShowCertificationHistory business rule is set to "Y")

Once a folder is opened, depending on the WIC Category of the participant (or applicant) the folder enables only those tabs and controls that apply to only the WIC Category of the participant. Refer to the respective tabs for specific information on Participant Folder tabs and sub-tabs.

9.1.2 Edits

Navigating among the tabs of the participant folder does not invoke the edit and save processing **until** data is modified. If data is modified on a specific tab, the following actions invoke the edit routines:

- Selecting another tab of the Participant Folder
- Clicking the Close Participant Folder toolbar button
- Selecting the Close Participant Folder menu item
- Invoking one of the following functions from a menu or toolbar button:
  - Search for Participant
  - Waiting List Manager
  - System Outputs
  - Appointment Scheduling
  - Benefit Issuance
- Exiting the Clinic Application from one of the following functions:
  - Exit toolbar button
  - Exit menu item
  - Clicking the X in the title bar
  - Double clicking the system menu icon on the title bar
  - Pressing Alt + F4

Standard Processing of Participant Folder Edits and Save Routines

If changes are made on a tab within the Participant Folder and the user attempts to exit the folder, exit the application or move onto another tab within the system, a standard confirmation dialog is invoked with the text, "Do you want to save the changes on this tab?" Yes, No and Cancel buttons are available.

- Select Yes
  - The edit and save routines are invoked for the tab. (see the respective tab for the specific edit and save routine information)
  - Upon successful validation of the data, the system advances to the function requested by the user
- Select No
  - The system discards the changes on the tab
  - The system advances to the function requested by the user that invoked the save message.
- Select Cancel

- The user is returned to the current tab in its current state without saving or discarding changes.

9.2 Menu Exceptions

In addition to the system menu options, when the Participant Folder is active, the following menu items are available:

- Participant Activities
- Benefit Management
- EBT Management
- Document Imaging

9.2.1 Participant Activities Menu

The menu is enabled when the Participant Folder is active. Its mnemonic is "P". It includes the following menu items:

- Toggle Applicant/Participant On-site
- Schedule Appointment
- Print Participant Appointment Schedule
- Certification

- Assign Risk Factors
- VOC Certification
- Breastfeeding
  - Item Issuance History
  - Issue Breastfeeding Items
  - Peer Counselor Contacts

- Change Household ID
- Review CPA-determined Follow-up Information
- Generate Official Notification
- Manually Terminate Participant
- Reinstate Terminated Participant
- Produce VOC Document

- Work with Another Household Member
- Manage Notes
- Manage Alerts
- Remove Incomplete Certification

- Print Participant Summary
- Print Certification Notice
- Close Participant Folder

9.2.1.1 Toggle Applicant/Participant On-site Menu Item

The menu item is enabled when the Participant Folder is active. Its mnemonic is "T" (see Toggle Applicant/Participant On-site in Clinic, Chapter 6 – Search and Selection).

9.2.1.1.1 Processing

When the menu item is selected, the system functions exactly as it would if the Toggle Applicant/Participant On-site toolbar button defined in this document was selected.

9.2.1.2 Schedule Appointment Menu Item

The menu item is enabled when the Participant Folder is active. Its mnemonic is "A" (see Processing for the Schedule Appointment Toolbar Button).

9.2.1.2.1 Processing

When the menu item is selected, the system functions exactly as it would if the Schedule Appointment toolbar button defined in this document was selected.

9.2.1.3 Print Participant Appointment Schedule Menu Item

The menu item is enabled when the Participant Folder is active. Its mnemonic is "I".

9.2.1.3.1 Processing

When the menu item is selected, the system prints the Participant Appointment Schedule Report defined in System Outputs Chapter 01 – System Outputs.

9.2.1.4 Certification Menu Item

The menu item is enabled when the Participant Folder is active. Its mnemonic is "E" (see Processing for Certification Toolbar Button).

9.2.1.4.1 Processing

When the menu item is selected, the system functions exactly as it would if the Certification toolbar button defined in this document was selected.

9.2.1.5 Assign Risk Factors Menu Item

The menu item is enabled when the Participant Folder is active. Its mnemonic is "K".

9.2.1.5.1 Processing

When the menu item is selected, if the user does not have the appropriate permissions (Risk Factors.Add or .FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to assign risk factors. Please see the supervisor."

Depending on the tab of the Participant Folder selected, the required entry edits and cross-edits for the controls on the tab are also performed. These edits are defined in the respective sections for each tab.

When all edits are satisfied, the information on the tab is saved and the Certification Risk Factors dialog defined in this document is invoked.

9.2.1.6 VOC Certification Menu Item

The menu item is enabled when the Participant Folder is active. Its mnemonic is "O."

9.2.1.6.1 Processing

When the menu item is selected, if the user does not have the appropriate permissions (Certification.FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to perform a VOC Certification. Please see the supervisor."

Depending on the tab of the Participant Folder selected, the required entry edits and cross-edits for the controls on the tab are also performed. These edits are defined in the respective sections for each tab.

When all edits are satisfied, the information on the tab is saved and the VOC Certification dialog defined in this document is invoked.

9.2.1.7 Breastfeeding Menu Item

The menu item is enabled when the Participant Folder is active. Its mnemonic is "B".

When the menu item is selected, the Breastfeeding sub-menu displays. It includes the following menu items:

- Item Issuance History
- Issue Breastfeeding Items

- Peer Counselor Contacts

9.2.1.7.1 Item Issuance History Menu Item

The menu item is enabled when the Participant Folder is active. Its mnemonic is "H".

9.2.1.7.1.1 Processing

When the menu item is selected, if the user does not have the appropriate permissions (BreastfeedingItemIssuance.View, .Add, or .FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to manage breastfeeding supplies. Please see the supervisor."

Depending on the tab of the Participant Folder selected, if changes have been made, the required edits and confirmation messages to save or cancel the changes on the tab are also performed. These edits are defined in the respective sections for each tab.

If the user has permission and all edits are satisfied, the Breastfeeding Item Issuance History dialog defined in Common Interface Panels, Chapter P – Breastpumps, Breastfeeding Kits and Supplies is invoked.

9.2.1.7.2 Issue Breastfeeding Items

The menu item is enabled when the Participant Folder is active. Its mnemonic is "B".

9.2.1.7.2.1 Processing

When the menu item is selected, if the user does not have the appropriate permissions (BreastfeedingItemIssuance.View, .Add, or .FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to manage breastfeeding supplies. Please see the supervisor."

Depending on the tab of the Participant Folder selected, if changes have been made, the required edits and confirmation messages to save or cancel the changes on the tab are also performed. These edits are defined in the respective sections for each tab.

If the user has permission and all edits are satisfied, the Issue Breastfeeding Items dialog defined in Common Interface Panels Chapter P - Breastpumps, Breastfeeding Kits and Supplies is invoked.

9.2.1.7.3 Peer Counselor Contacts

The menu item is enabled when the Participant Folder is active. Its mnemonic is "R".

9.2.1.7.3.1 Processing

When the menu item is selected, if the user does not have the appropriate permissions (BreastfeedingContacts.View, .Add, or .FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to view breastfeeding peer counselor contact information. Please see the supervisor."

Depending on the tab of the Participant Folder selected, if changes have been made, the required edits and confirmation messages to save or cancel the changes on the tab are also performed. These edits are defined in the respective sections for each tab

If the user has permission and all edits are satisfied, the information on the tab is saved and the Breastfeeding Peer Counselor Contacts dialog defined in Common Interface Panels Chapter Q - Breastfeeding Peer Counselor Contacts is invoked.

9.2.1.8 Change Household ID Menu Item

The menu item is enabled when the Participant Folder is active. Its mnemonic is "H".

9.2.1.8.1 Processing

When the menu item is selected, if the user does not have the appropriate permissions (Household.FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to change the Household ID for the applicant/participant. Please see the supervisor."

If the EBT_PROCESSOR_TYPE business rule is set to "0" (Zero or Off-line)

If the Household has an Electronic Benefits Account, edits prevent moving the member from the household if there are any active unused, unexpired benefits unless the card is in the reader – To be completed with EBT COMPLIANT. Otherwise, the member forfeits the benefits because they are linked to that card.

If the EBT_PROCESSOR_TYPE business rule is set to "1" (One or On-line)

If the Household has an Electronic Benefits Account, edits allow the member to be changed to a different household and conform to the On-line processor interfaces – To be completed with EBT COMPLIANT. Otherwise, the member forfeits the benefits because they are linked to that card.

Depending on the particular tab of the Participant Folder selected, the required entry edits and cross-edits for the controls on the tab are also performed. These edits are defined in the respective sections for each tab.

When all edits are satisfied, the information on the tab is saved and the Change Household ID dialog (for non-EBT clinics) or the EBT Household Change Guided Script dialog (for EBT clinics) defined in Clinic, Chapter 12 – Participant Changes is invoked.

9.2.1.9 Review CPA-determined Follow-up Information Menu Item

The menu item is enabled when the Participant Folder is active and the participant is in a valid certification period. Its mnemonic is "P".

9.2.1.9.1 Processing

When the menu item is selected, if the user does not have the appropriate permissions (CPAFollowUp.FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to update CPA-determined follow-up information. Please see the supervisor."

Depending on the tab of the Participant Folder selected, the required entry edits and cross-edits for the controls on the tab are performed. These edits are defined in the respective sections for each tab.

When all edits are satisfied, the information on the tab is saved, and the CPA-determined Follow-up dialog defined in Common Interface Panels, Chapter O – CPA Determined Follow-up is invoked.

9.2.1.10 Generate Official Notification Menu Item

The menu item is enabled when the Participant Folder is active and the participant is due to be terminated by automatic means within 15 days. Its mnemonic is "G".

9.2.1.10.1 Processing

When the menu item is selected, depending on the tab of the Participant Folder selected, the required entry edits and cross-edits for the controls on the tab are also performed. These edits are defined in the respective sections for each tab.

When all edits are satisfied, the information on the tab is saved and the Generate Official Notification dialog defined in this document is invoked.

9.2.1.11 Manually Terminate Participant Menu Item

The menu item is enabled when the Participant Folder is active and the participant is in a valid certification period. Its mnemonic is "M".

9.2.1.11.1 Processing

When the menu item is selected, if the user does not have the appropriate permissions (ParticipantStatus.FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to manually terminate the certification for the participant. Please see the supervisor."

Depending on the tab of the Participant Folder selected, the required entry edits and cross-edits for the controls on the tab are also performed. These edits are defined in the respective sections for each tab.

When all edits are satisfied, the information on the tab is saved and the Manually Terminate Participant dialog defined in Clinic, Chapter 12 – Participant Changes is invoked.

9.2.1.12 Reinstate Terminated Participant Menu Item

The menu item is enabled when the Participant Folder is active, the participant has been terminated from the current certification period and the current system date is less than or equal to the end of the certification date. The menu item has a mnemonic of "S".

9.2.1.12.1 Processing

When the menu item is selected, if the user does not have the appropriate permissions (ParticipantStatus.FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to reinstate the participant. Please see the supervisor."

Depending on the tab of the Participant Folder selected, the required entry edits and cross-edits for the controls on the tab are also performed. These edits are defined in the respective sections for each tab.

When all edits are satisfied, the information on the tab is saved and the Reinstate Terminated Participant dialog defined in Clinic, Chapter 12 – Participant Changes is invoked.

9.2.1.13 Produce VOC Document Menu Item

If the SetNumberOfVOCPrints business rule is set to "N", the menu item is enabled when the Participant Folder is active. Its mnemonic is "U".

If the SetNumberOfVOCPrints business rule is set to "Y", the menu item is enabled whenever the number of times the document has been printed is less than the maximum number the document is allowed to be printed.

9.2.1.13.1 Processing

When the menu item is selected, if the user does not have the appropriate permissions (Certification.View or .FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to produce a VOC document. Please see the supervisor."

Per the business rule VOC_ALLOWED, Verification of Certification document(s) may be produced for a participant during the current or most recent certification period. When the user attempts to produce the VOC Document, the participant information is checked to determine if a VOC has already been produced for the participant. If a VOC has been produced, a standard error dialog is invoked with the text, "The Verification of Certification document has already been produced for this certification period of the participant. Please contact the Help Desk for assistance with reprinting the Verification of Certification document."

Depending on the tab of the Participant Folder selected, the required entry edits and cross-edits for the controls on the tab are performed. These edits are defined in the respective sections for each tab.

When all edits are satisfied, the information on the tab is saved and the Produce VOC Document dialog defined in System Outputs Chapter 01 – System Outputs is invoked.

Per the business rule VOC_TRACKPRINT, when a VOC is printed an auto generated note is added to the participant folder to log the date, report, and who printed the VOC.

9.2.1.14 Work with Another Household Member Menu Item

The menu item is enabled when the Participant Folder is active. Its mnemonic is "W".

9.2.1.14.1 Processing

When the menu item is selected, a check is performed to determine whether there are additional household members. If there are no other household members associated with the selected participant's household ID, a standard error dialog is invoked with the text, "No additional members exist for this household." Upon dismissing the message, the user is returned to the participant's folder.

Depending on the tab of the Participant Folder selected, the required entry edits and cross-edits for the controls on the tab are performed. These edits are defined in the respective sections for each tab.

When all edits are satisfied, if additional members are found with the associated household ID, the information on the tab is saved, and the Work with Another Household Member (Participant Folder) dialog defined in Common Interface Panels, Chapter B – Work with Another Household Member is invoked.

9.2.1.15 Manage Notes Menu Item

The menu item is enabled when the Participant Folder is active. Its mnemonic is "N".

9.2.1.15.1 Processing

When the menu item is selected, the View Notes for Household Member dialog defined in this document is invoked.

9.2.1.16 Manage Alerts Menu Item

The menu item is enabled when the Participant Folder is active. Its mnemonic is "L".

9.2.1.16.1 Processing

When the menu item is selected, the Alerts list for Household dialog defined in this document is invoked.

9.2.1.17 Remove Incomplete Certification Menu Item

The menu item is enabled when the Participant Folder is active and an incomplete certification exists. Its mnemonic is "V".

9.2.1.17.1 Processing

When the menu item is selected, the permissions of the logged-on user are checked. If the user does not have the Certification.FullControl permission, a standard error dialog is invoked with the text, "You do not have the necessary permissions to remove the incomplete certification. Please see the supervisor."

If the user has the Certification.FullControl permission, a standard confirmation dialog is invoked with the text, "The current certification attempt is removed for the participant along with all of its related information. This information cannot be recovered after it has been removed. Do you wish to continue?" If the user selects "Yes" the incomplete certification attempt is removed for this participant. If the user selects "No" the certification attempt remains in effect and the user is returned to the Participant Folder.

9.2.1.18 Print Participant Summary Menu Item

The menu item is enabled when the Participant Folder is active. Its mnemonic is "R".

9.2.1.18.1 Processing

When the menu item is selected:

- If the participant does not have certification information, a standard error dialog is invoked with the text, "A certification attempt must exist on the system to produce a Participant Summary for the household member."
- If the participant has certification information, the Produce Participant Summary dialog defined in System Outputs Chapter 01 – System Outputs is invoked.

9.2.1.19 Print Certification Notice Menu Item

The menu item is enabled when the Participant Folder is active. Its mnemonic is "U".

9.2.1.19.1 Processing

When the menu item is selected, a check is performed to determine whether the participant is in a valid certification.

If the participant IS NOT in a valid certification, a standard error dialog is invoked with the text, "The participant must be in a valid certification on the system to print a Certification Notice."

If the participant IS in a valid certification one of the following occurs:

- If the Household.CorrespondenceLanguage = "S" (Spanish), the system generates the Certification Notice in Spanish defined in System Outputs Chapter 01 – System Outputs.
- If the Household.CorrespondenceLanguage = "E" (English) the system generates the Certification Notice in English defined in System Outputs Chapter 01 – System Outputs.

The system sends the Certification Notice to the other output printer (see System Tools).

9.2.1.20 Close Participant Folder Menu Item

The menu item is enabled when the Participant Folder is active. Its mnemonic is "C" (See Processing for Close Participant Folder Toolbar Button).

9.2.1.20.1 Processing

When the menu item is selected, the system functions exactly as it would if the Close Participant Folder toolbar button defined in this document was selected.

9.2.2 Benefit Management Menu

The menu is enabled when the Participant Folder is active. It has no mnemonic. It includes the following menu items:

- Issue Benefits
- Void Benefits Issued at This Clinic
- Void Benefit Issued at Other Clinic
- Mark Benefits as Lost/Stolen
- Reprint Benefits for Custody Change
- Add/Replace Set of Benefits
- EBT Household Demographics
- Print EBT Account Balance
- View EBT Card History
- View EBT Transaction History
- Food Adjustment Wizard

9.2.2.1 Issue Benefits Menu Item

The menu item is enabled when the Participant Folder is active and the participant is in a valid certification period. Its mnemonic is "I" (see Processing for Issue Benefits toolbar button).

9.2.2.1.1 Processing

When the menu item is selected, the system functions exactly as it would if the Issue Benefits toolbar button defined in section 9.3.1.4 of this document was selected.

9.2.2.2 Void Benefits Issued at This Clinic Menu Item

For non-EBT clinics, the menu item is enabled when the Participant Folder is active and the participant is in a valid certification period. When the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic and the Participant Folder window is active, the menu option is visible and enabled only when:

- The current clinic was previously a non-EBT clinic, checks with a future date were issued to the participant, and the clinic became an EBT clinic yet the participant still has paper-based checks to redeem.
- Checks were issued with a future date for the participant at a non-EBT clinic and then the participant is transferred to an EBT-enabled clinic.

(For more information about enabling the Electronic Benefit Transfer (EBT) food delivery system, see the Update Clinic Dialog section of Application Administration Chapter 09 - Reference Utility.) Its mnemonic is "V".

9.2.2.2.1 Processing

When the menu item is selected, if the user does not have the appropriate permissions (CheckIssuance.FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to void benefits for the participant. Please see the supervisor."

Depending on the tab of the Participant Folder selected, the required entry edits and cross-edits for the controls on the tab are also performed. These edits are defined in the respective sections for each tab.

When all edits are satisfied, the information on the tab is saved, and the Identify Benefits to Void dialog defined in Clinic Chapter 11 – Food Instrument Production is invoked.

9.2.2.3 Void Benefits Issued at Other Clinic Menu Item

For non-EBT clinics, the menu item is enabled when the Participant Folder is active and the participant is in a valid certification period. When the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic and the Participant Folder window is active, the menu option is visible and enabled only when:

- The current clinic was previously a non-EBT clinic, checks with a future date were issued to the participant, and the clinic became an EBT clinic yet the participant still has paper-based checks to redeem.
- Checks were issued with a future date for the participant at a non-EBT clinic and then the participant is transferred to an EBT-enabled clinic.

(For more information about enabling the Electronic Benefit Transfer (EBT) food delivery system, see the Update Clinic Dialog section of Application Administration Chapter 09 - Reference Utility.) Its mnemonic is "D".

9.2.2.3.1 Processing

When the menu item is selected, if the user does not have the appropriate permissions (CheckIssuance.FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to void benefits for the participant. Please see the supervisor."

Depending on the tab of the Participant Folder selected, the required entry edits and cross-edits for the controls on the tab are also performed. These edits are defined in the respective sections for each tab.

When all edits are satisfied, the information on the tab is saved, and the Void Benefits Issued at Another Clinic dialog defined in Clinic, Chapter 11 – Food Instrument Production is invoked.

9.2.2.4 Mark Benefits as Lost/Stolen Menu Item

For non-EBT clinics, the menu item is enabled when the Participant Folder is active and the participant is in a valid certification period. When the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic and the Participant Folder window is active, the menu option is visible and enabled only when:

- The current clinic was previously a non-EBT clinic, checks with a future date were issued to the participant, and the clinic became an EBT clinic yet the participant still has paper-based checks to redeem.
- Checks were issued with a future date for the participant at a non-EBT clinic and then the participant is transferred to an EBT-enabled clinic.

(For more information about enabling the Electronic Benefit Transfer (EBT) food delivery system, see the Update Clinic Dialog section of Application Administration Chapter 09 - Reference Utility.) Its mnemonic is "R".

9.2.2.4.1 Processing

When the menu item is selected, if the user does not have the appropriate permissions (CheckIssuance.FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to mark benefits as lost/stolen for the participant. Please see the supervisor."

Depending on the particular tab of the Participant Folder selected, the required entry edits and cross-edits for the controls on the tab are also performed. These edits are defined in the respective sections for each tab.

When all edits are satisfied, the information on the tab is saved, and the Identify Lost/Stolen Benefits dialog defined in Clinic, Chapter 11 – Food Instrument Production is invoked.

9.2.2.5 Reprint Benefits for Custody Change

For non-EBT clinics, the menu item is enabled when the Participant Folder is active and the participant is in a valid certification period. When the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic and the Participant Folder window is active, the menu option is visible and enabled only when:

- The current clinic was previously a non-EBT clinic, checks with a future date were issued to the participant, and the clinic became an EBT clinic yet the participant still has paper-based checks to redeem.
- Checks were issued with a future date for the participant at a non-EBT clinic and then the participant is transferred to an EBT-enabled clinic.

(For more information about enabling the Electronic Benefit Transfer (EBT) food delivery system, see the Update Clinic Dialog section of Application Administration Chapter 09 - Reference Utility.) Its mnemonic is "K".

9.2.2.5.1 Processing

When the menu item is selected, if the user does not have the appropriate permissions (CheckIssuance.FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to reprint benefits for the participant. Please see the supervisor."

Depending on the tab of the Participant Folder selected, the required entry edits and cross-edits for the controls on the tab are also performed. These edits are defined in the respective sections for each tab.

When all edits are satisfied, the information on the tab is saved, and the Identify Benefits to Reprint for Custody Change dialog defined in Clinic, Chapter 11 – Food Instrument Production is invoked.

9.2.2.6 Add/Replace Set of Benefits

For non-EBT clinics, the menu item is enabled when the Participant Folder is active and the participant is in a valid certification period. When the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic and the Participant Folder window is active, the menu option is visible and enabled only when:

- The current clinic was previously a non-EBT clinic, checks with a future date were issued to the participant, and the clinic became an EBT clinic yet the participant still has paper-based checks to redeem.

- Checks were issued with a future date for the participant at a non-EBT clinic and then the participant is transferred to an EBT-enabled clinic.

(For more information about enabling the Electronic Benefit Transfer (EBT) food delivery system, see the Update Clinic Dialog section of Application Administration Chapter 09 - Reference Utility.) Its mnemonic is "L".

9.2.2.6.1 Processing

When the menu item is selected, if the user does not have the appropriate permissions (CheckIssuance.FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to add or replace sets of benefits for the participant. Please see the supervisor."

Depending on the tab of the Participant Folder selected, the required entry edits and cross-edits for the controls on the tab are also performed. These edits are defined in the respective sections for each Tab.

When all edits are satisfied, the information on the tab is saved, and the Add/Replace Set of Benefits dialog defined in Clinic, Chapter 11 – Food Instrument Production is invoked.

9.2.2.7 EBT Household Demographics

The menu item allows the user to access EBT household demographic management functions. The menu option is visible and enabled when the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic and the Participant Folder window is active. (For more information about enabling the Electronic Benefit Transfer (EBT) food delivery system, see the Update Clinic Dialog section of Application Administration Chapter 09 - Reference Utility.) It has no mnemonic.

9.2.2.7.1 Processing

When the menu item is selected, the permissions of the logged-on user are checked. If the user does not have the EBT.Account.Setup permission, a standard error dialog is invoked with the text, "You do not have the necessary permissions to access EBT Household Demographics. Please see the supervisor." If the user has the EBT.Account.Setup permission, the EBT Household Demographics dialog defined in Clinic Chapter 11 - Food Instrument Production is invoked.

9.2.2.8 Print EBT Account Balance

The menu item allows the user to access the EBT Account Balance report. The menu option is visible and enabled when the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic and the Participant Folder window is active. (For more information about enabling the Electronic Benefit Transfer (EBT) food delivery system, see the Update Clinic Dialog section of Application Administration Chapter 09 - Reference Utility.) It has no mnemonic.

9.2.2.8.1 Processing

When the menu item is selected, the permissions of the logged-on user are checked. If the user does not have the EBT.Account.Setup permission, a standard error dialog is invoked with the text, "You do not have the necessary permissions to access the EBT Account Balance report. Please see the supervisor." If the user has the EBT.Account.Setup permission, the Generate EBT Account Balance Report dialog defined in System Outputs Chapter 01 - System Outputs is invoked.

9.2.2.9 View EBT Card History

The menu item allows the user to access the EBT Card History dialog. The menu option is visible and enabled when the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic and the Participant Folder window is active. (For more information about enabling the Electronic Benefit Transfer (EBT) food delivery system, see the Update Clinic Dialog section of Application Administration Chapter 09 - Reference Utility.) It has no mnemonic.

9.2.2.9.1 Processing

When the menu item is selected, the permissions of the logged-on user are checked. If the user does not have the EBT.Account.Setup permission, a standard error dialog is invoked with the text, "You do not have the necessary permissions to access the EBT Account Balance report. Please see the supervisor." If the user has the EBT.Account.Setup permission, the EBT Card History dialog defined in 9.39 is invoked.

9.2.2.10 View EBT Transaction History

The menu item allows the user to access the EBT Transaction History dialog. The menu option is visible and enabled when the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic and the Participant Folder window is active. (For more information about enabling the Electronic Benefit Transfer (EBT) food delivery system, see the Update Clinic Dialog section of Application Administration Chapter 09 - Reference Utility.) It has no mnemonic.

9.2.2.10.1 Processing

When the menu item is selected, the permissions of the logged-on user are checked. If the user does not have the EBT.Account.Setup permission, a standard error dialog is invoked with the text, "You do not have the necessary permissions to access the EBT Account Balance report. Please see the supervisor." If the user has the EBT.Account.Setup permission, the EBT Transaction History dialog defined in 9.40 is invoked.

9.2.2.11 Food Adjustment Wizard

The menu item allows the user to access the Food Adjustment Wizard dialog. The menu option is visible and enabled when the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic and the Participant Folder window is active. (For more information about enabling the Electronic Benefit Transfer (EBT) food delivery system, see the Update Clinic Dialog section of Application Administration Chapter 09 - Reference Utility.) It has no mnemonic.

9.2.2.11.1 Processing

When the menu item is selected, the permissions of the logged-on user are checked. If the user does not have the EBT.Account.Setup permission, a standard error dialog is invoked with the text, "You do not have the necessary permissions to access the EBT Account Balance report. Please see the supervisor." If the user has the EBT.Account.Setup permission, the Food Adjustment Wizard dialog defined in section 9.42 is invoked.

9.2.3 Document Imaging Menu

The menu is enabled when the Participant Folder is active. Its mnemonic is "D". It includes the following menu items:

- Scan a Document
- View Scanned Documents

9.2.3.1 Scan a Document

The menu item is enabled when the Participant Folder is active. Its mnemonic is "S".

9.2.3.1.1 Processing

When the menu item is selected, the permissions of the logged-on user are checked. If the user does not have the DocumentImaging.Add permission, a standard error dialog is invoked with the text, "You do not have the necessary permissions to scan a document. Please see the supervisor." If the user has the DocumentImaging.Add permission, the Scan a Document dialog defined in Clinic, Chapter 14 – Document Imaging is invoked.

9.2.3.2 View Scanned Documents

The menu item is enabled when the Participant Folder is active. Its mnemonic is "V".

9.2.3.2.1 Processing

When the menu item is selected, the permissions of the logged-on user are checked. If the user does not have the DocumentImaging.View permission, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view scanned documents. Please see the supervisor." If the user has the DocumentImaging.View permission, the Scanned Documents dialog defined in Clinic, Chapter 14 – Document Imaging is invoked.

9.3 Toolbar Exceptions

In addition to the system toolbar options, when the Participant Folder is active several additional toolbar options are available.

9.3.1 Participant Folder Toolbar

The toolbar is enabled when the Participant Folder is active. It includes the following toolbar buttons:

- Toggle Applicant/Participant On-site
- Schedule Participant Appointment
- Certification
- Issue Benefits
- Open Participant Folder

Figure 2 – Participant Folder Toolbar

9.3.1.1 Toggle Applicant/Participant On-site Toolbar Button

The toolbar button is enabled when the Participant Folder is active. It has tool tip text of "Toggle Applicant/Participant On-site".

Figure 3 – Toggle Applicant/Participant On-site Toolbar Button

9.3.1.1.1 Processing

When the toolbar button is selected, depending on the tab of the Participant Folder selected, the required entry edits and cross-edits for the controls on the tab are performed. These edits are defined in the respective sections for each tab.

When all edits are satisfied, the information on the tab is saved, and the Toggle Applicant/Participant as On-site dialog defined in Clinic, Chapter 06 – Search-Selection is invoked.

9.3.1.2 Schedule Participant Appointment Toolbar Button

The toolbar button is enabled when the Participant Folder is active. It has tool tip text of "Schedule Participant Appointment".

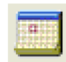


Figure 4 – Schedule Participant Appointment Toolbar Button

9.3.1.2.1 Processing

When the toolbar button is selected, if the user does not have the appropriate permissions (Appointments.Add or .FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to schedule appointments. Please see the supervisor."

Depending on the tab of the Participant Folder selected, the required entry edits and cross-edits for the controls on the tab are also performed. These edits are defined in the respective sections for each tab.

When all edits are satisfied, the information on the tab is saved, and the Select Appointment to Schedule dialog defined in Clinic, Chapter 08 – Appointment Scheduling is invoked.

9.3.1.3 Certification Toolbar Button

The toolbar button is enabled when the Participant Folder is active. It has tool tip text of "Certification".

Figure 5 – Certification Toolbar Button

9.3.1.3.1 Processing

When the toolbar button is selected, if the user does not have the appropriate permissions (Certification.FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to update Certification. Please see the supervisor."

When the participant is within a valid certification period, a check is performed to determine whether the current system date is within 45 days inclusive of the end of the current certification for the participant. When the current system date is not within 45 days of the end of the current certification for the participant, and the participant is not postpartum (WICStatus <> "B" or "N"), a standard error dialog is invoked with the text, "A new certification attempt cannot be started for the participant until 45 days before the end of the current certification period for the participant."

If the system date is within the 45 days, the system verifies the WIC Category of the participant. If the participant is within 45 days inclusive of the end of the current certification and has a WIC Category of postpartum (WICStatus = "B" or "N"), a standard error dialog is invoked with the text, "Only a new Pregnant certification attempt can be started for a participant who has more than 45 days before the end of her current postpartum certification period."

- When the OK button is selected on the error message, the Certification WIC Category dialog defined in Clinic Chapter 10 - Certification Guided Script is invoked.

When the participant is ineligible for certification, a standard error dialog is invoked with the text, "This applicant/participant is ineligible to be certified for WIC benefits."

- This message only displays if the participant's most current certification was marked as ineligible and the certification ineligibility date is not less than the current system date.

Depending on the tab of the Participant Folder selected, the required entry edits and cross-edits for the controls on the tab are also performed. These edits are defined in the respective sections for each tab.

When a certification attempt has not previously been started for the participant, a standard confirmation dialog is invoked with the text, "Do you want to start a certification attempt for the participant?" Yes and No buttons are available.

- Select "No", the user is returned to the Participant Folder.
- Select "Yes", the Certification Guided Script window defined in Clinic, Clinic Chapter 10 - Certification Guided Script is invoked.

If the system date is within the 45 days, the system verifies the WIC Category of the participant. If the participant is within 45 days inclusive of the end of the current certification and has a WIC Category of pregnant (WICStatus = "P"), the Certification WIC Category dialog defined in Clinic Chapter 10 - Certification Guided Script is invoked.

9.3.1.4 Issue Benefits Toolbar Button

The toolbar button is enabled when the Participant Folder is active and the participant is in a valid certification period. It has a tool tip text of "Issue Benefits".

Figure 6 – Issue Benefits Toolbar Button

9.3.1.4.1 Processing

When the toolbar button is selected, if the user does not have the appropriate permissions (CheckIssuance.Add or .FullControl), a standard error dialog is invoked with the text: "You do not have the necessary permissions to issue benefits for the participant. Please see the supervisor."

Depending on the tab of the Participant Folder selected, the required entry edits and cross-edits for the controls on the tab are also performed. These edits are defined in the respective sections for each tab.

If a member of the household is an infant or a child and is breastfeeding the system verifies the Verified Date is equal to the current system date. If the date is not equal to the current system date, a standard confirmation dialog is invoked with the text, "Benefits will not be issued for participants {Statewicid} {Last Name}, {First Name}.

REASON: The participant is marked as breastfeeding now. Please go to the Child Health Information tab and verify the breastfeeding category. Benefits cannot be issued until the breastfeeding category is verified."

If the DspChildrenUnder5ChecksNotEligibleMsgs business rule is "Y", the above message is only displayed for children under the age of five (5) who are not eligible to receive benefits.

If the Homeless check box is checked and the Homeless Verified Date is 30 days prior to the current system date, a standard confirmation dialog is invoked with the text, "Benefits will not be issued for participants {Statewicid} {Last Name}, {First Name}.

REASON: The participant is marked as homeless. Please go to the Demographics tab and verify the homeless status. Benefits cannot be issued until the homeless status is verified."

If the DspChildrenUnder5ChecksNotEligibleMsgs business rule is "Y", the above message is only displayed for children under the age of five (5) who are not eligible to receive benefits.

If the difference between the last date to use attribute on the member table and the system date is not 27 days or less for any participant in the household, a standard confirmation dialog is invoked with the text, "Benefits will not be issued for participants {Statewicid} {Last Name}, {First Name}.

REASON: The difference between the Last Date to Use and the current system date is not 27 days or less."

If the DspChildrenUnder5ChecksNotEligibleMsgs business rule is "Y", the above message is only displayed for children under the age of five (5) who are not eligible to receive benefits.

When all edits are satisfied, the Issue Benefits dialog defined in Clinic Chapter 11 – Food Instrument Production is invoked.

9.3.1.5 Close Participant Folder Toolbar Button 

The toolbar button is enabled when the Participant Folder is active. It has a tool tip text of "Close Participant Folder".

9.3.1.5.1 Processing

When the toolbar button is selected, depending on the tab of the Participant Folder selected, the required entry edits and cross-edits for the controls on the tab are performed. These edits are defined in the respective sections for each tab.

When all edits are satisfied, the system closes the Participant Folder and returns the Participant List in its previous state.

9.4 Demographics Tab (Demographics Sub-tab)

The Demographics sub-tab of the Demographics tab of the Participant Folder allows the user to view and update basic demographic information about the participant. It is invoked in response to the following user actions:

- Selection of the Demographics sub-tab while the Demographics tab is active in the Participant Folder
- Selection of the Demographics tab in the Participant Folder

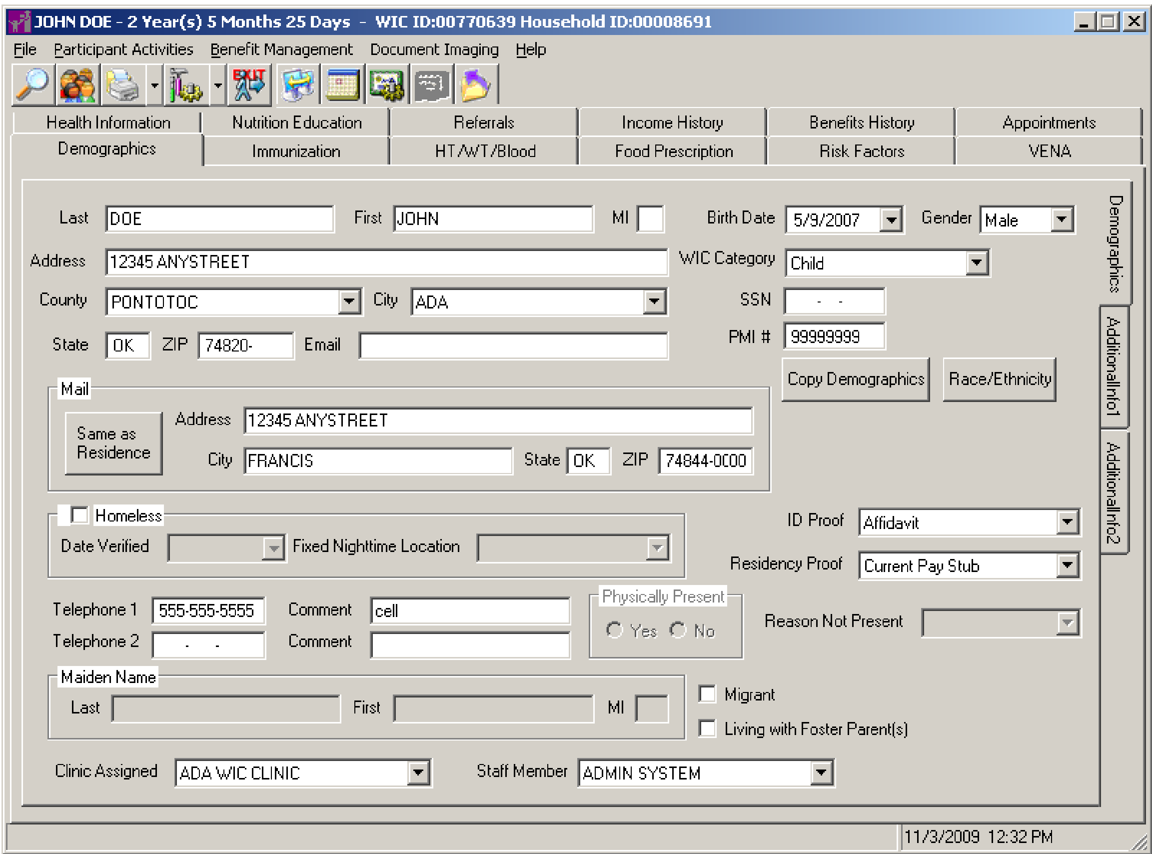


Figure 7 – Demographics Tab (Demographics Sub-tab)

9.4.1 Controls

The Demographics Tab displays the Panels for Demographics, Additional Info 1, and Additional Info 2 Sub-tabs. All controls and functionality are defined on the Demographics Sub-tab in Common Interface Panels, Chapter A – Demographic Information Panels.

9.4.2 Processes

The system verifies if there is a certification in progress. If at least one certification is started and not completed, the controls on **all Demographic sub-tabs** (Demographics sub-tab, Additional Info 1 sub-tab and Additional Info 2 sub-tab) are locked and updating is not allowed until the Certification has been completed. This applies if a record exists for the selected StateWICID in the CertContact table and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

9.5 Demographics Tab (Additional Info 1 Sub-tab)

The Additional Info 1 sub-tab of the Demographics Tab contains additional information about the participant. It is invoked when the user selects the Additional Info 1 sub-tab while the Demographics tab is active in the Participant Folder.

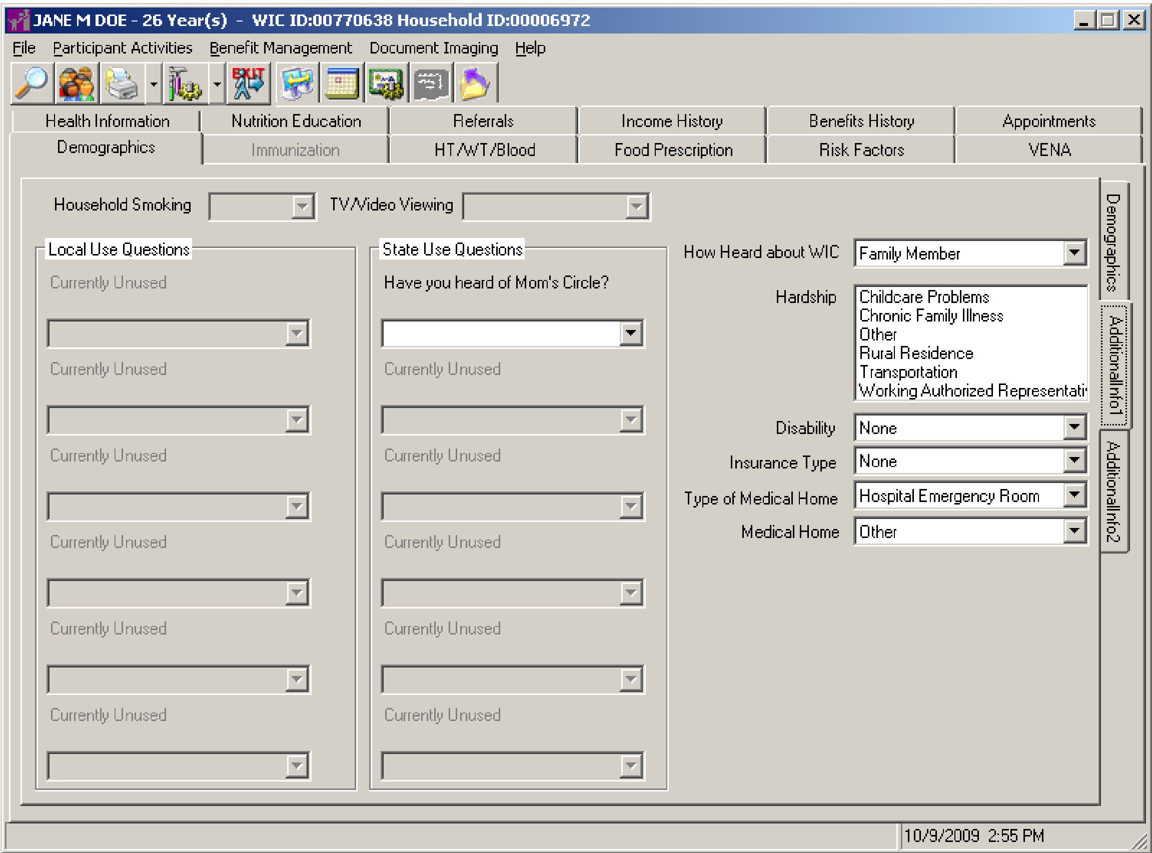


Figure 8 – Demographics Tab (Additional Info 1 Sub-tab)

9.5.1 Controls

All controls on this dialog are part of the common interface panels defined in Common Interface Panels, Chapter A – Demographic Information Panels.

9.5.2 Processes

The system verifies if there is a certification in progress. If at least one certification is started and not completed, the controls on **all Demographic sub-tabs** (Demographics sub-tab, Additional Info 1 sub-tab and Additional Info 2 sub-tab) are locked and updating is not allowed until the Certification has been completed. This applies if a record exists for the selected StateWICID in the CertContact table and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

9.6 Demographics Tab (Additional Info 2 Sub-tab)

The Additional Info 2 sub-tab of the Demographics tab contains more information for the participant. It is invoked when the user selects the Additional Info 2 sub-tab while the Demographics tab is active in the Participant Folder.

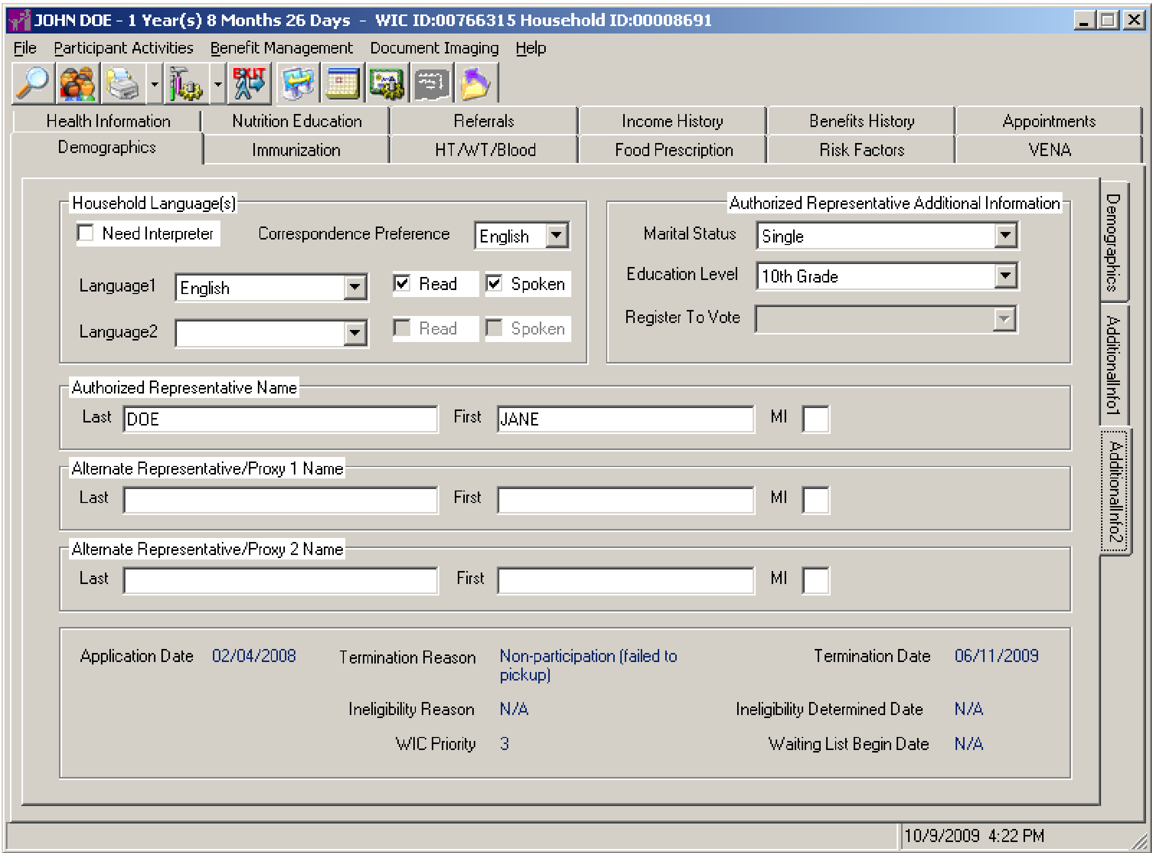


Figure 9 – Demographics Tab (Additional Info 2 Sub-tab – Infant/Child)

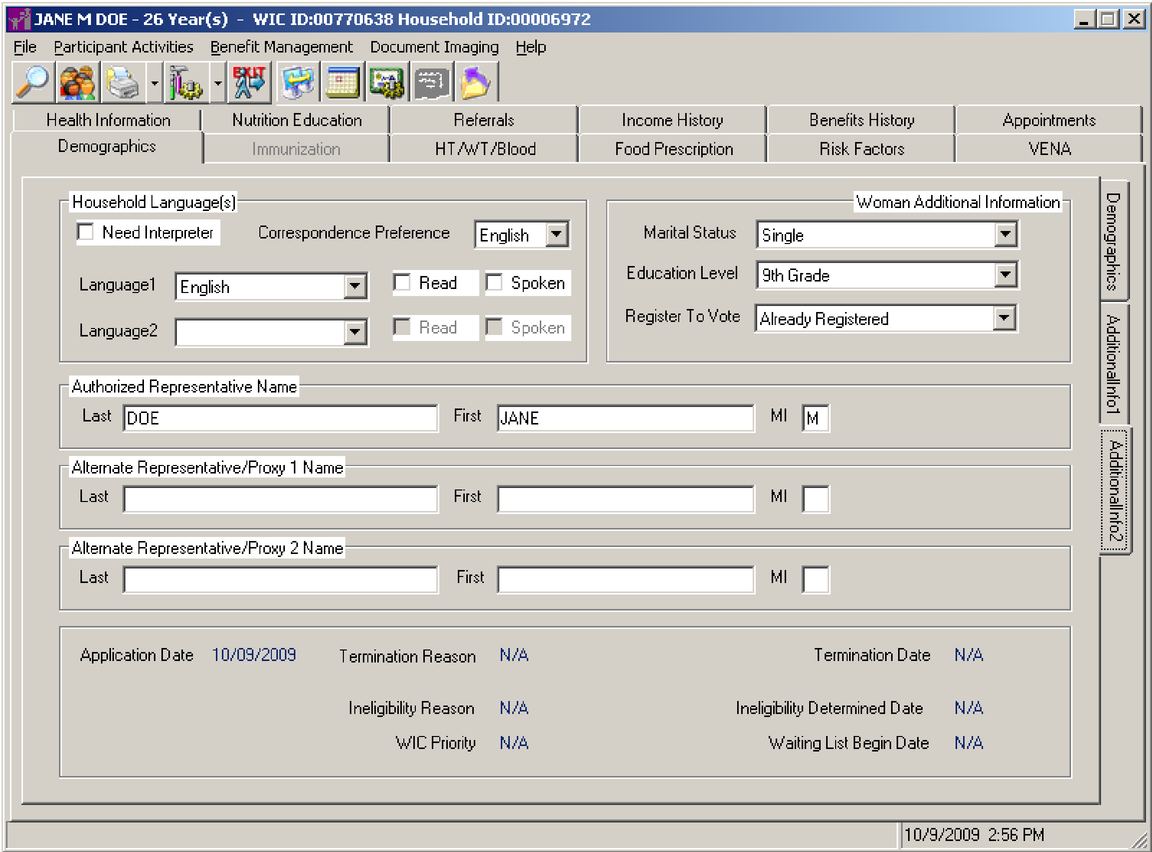


Figure 10 – Demographics Tab (Additional Info 2 Sub-tab – Woman)

9.6.1 Controls

The controls for the Additional Sub-tab 2 are defined in Common Interface Panels, Chapter A – Demographic Information Panels.

9.6.2 Processes

The system verifies if there is a certification in progress. If at least one certification is started and not completed, the controls on **all Demographic sub-tabs** (Demographics sub-tab, Additional Info 1 sub-tab and Additional Info 2 sub-tab) are locked and updating is not allowed until the Certification has been completed. This applies if a record exists for the selected StateWICID in the CertContact table and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

9.7 Height/Weight/Blood Tab (Height/Weight Sub-tab)

The Height/Weight sub-tab of the Height/Weight/Blood tab of the Participant Folder allows the user to view, add, or edit anthropometric measurements for the participant. It is the default sub-tab displayed when the user selects the Height/Weight/Blood tab when the participant folder is open. It is invoked when the user selects the Height/Weight sub-tab from the Blood sub-tab while the Height/Weight/Blood tab is active.

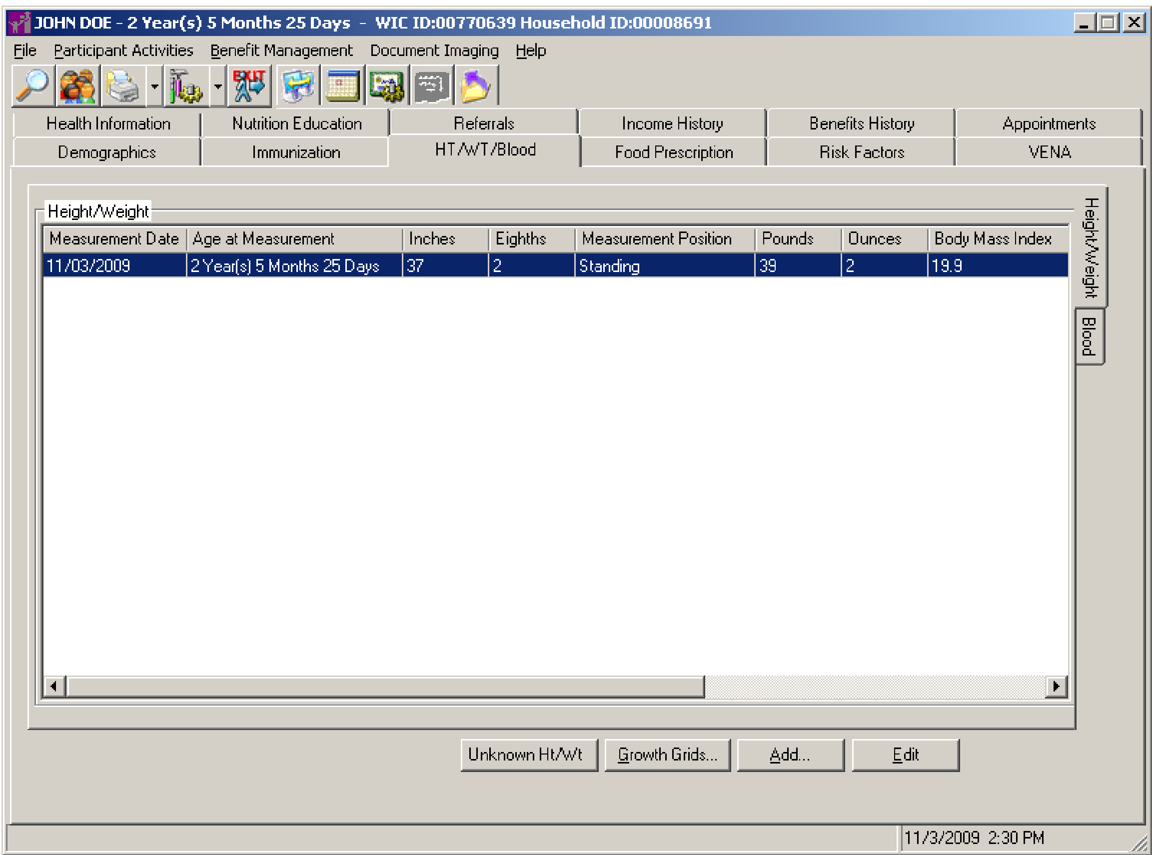


Figure 11 – HT/WT/Blood Tab (Height/Weight Sub-tab)

9.7.1 Controls

The controls for the Height/Weight sub-tab of the Height/Weight/Blood tab are defined in Common Interface Panels, Chapter G – Height Weight Bloodwork.

9.7.2 Processes

The system verifies if there is a certification in progress. If at least one certification is started and not completed, the controls on the Height/Weight and Blood panel are locked and adding records, updating records or viewing growth grids is not allowed until the Certification has been completed. This applies if a record exists for the selected StateWICID in the CertContact table and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

9.8 Height/Weight/Blood Tab (Blood Sub-tab)

The Blood sub-tab of the Height/Weight/Blood tab of the Participant Folder allows the user to view, add, or edit blood work results for the participant. It is invoked when the user selects the Blood sub-tab while the Height/Weight/Blood tab is active in the Participant Folder.

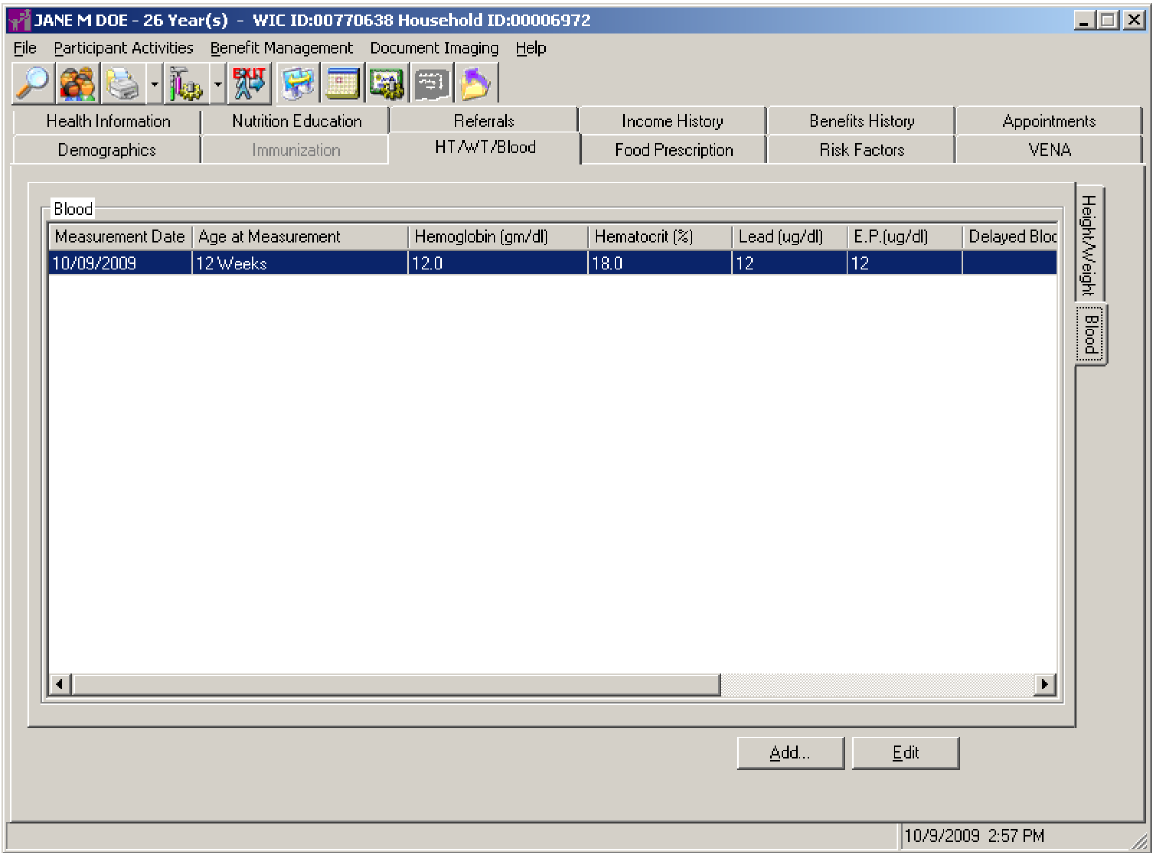


Figure 12 – Height/Weight/Blood Tab (Blood Sub-tab)

9.8.1 Controls

The controls for the Blood sub-tab of the Height/Weight/Blood tab are defined in Common Interface Panels, Chapter G – Height Weight Bloodwork.

9.8.2 Processes

The system verifies if there is a certification in progress. If at least one certification is started and not completed, the controls on the Height/Weight and Blood panel are locked and adding records, updating records or viewing growth grids is not allowed until the Certification has been completed. This applies if a record exists for the selected StateWICID in the CertContact table and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

9.9 VENA Tab

The VENA Contact interface allows the user to view, add, edit, and delete VENA contact information. This interface can be found on the VENA tab of the Participant Folder as well as the VENA panel from within the Certification Guided Script.

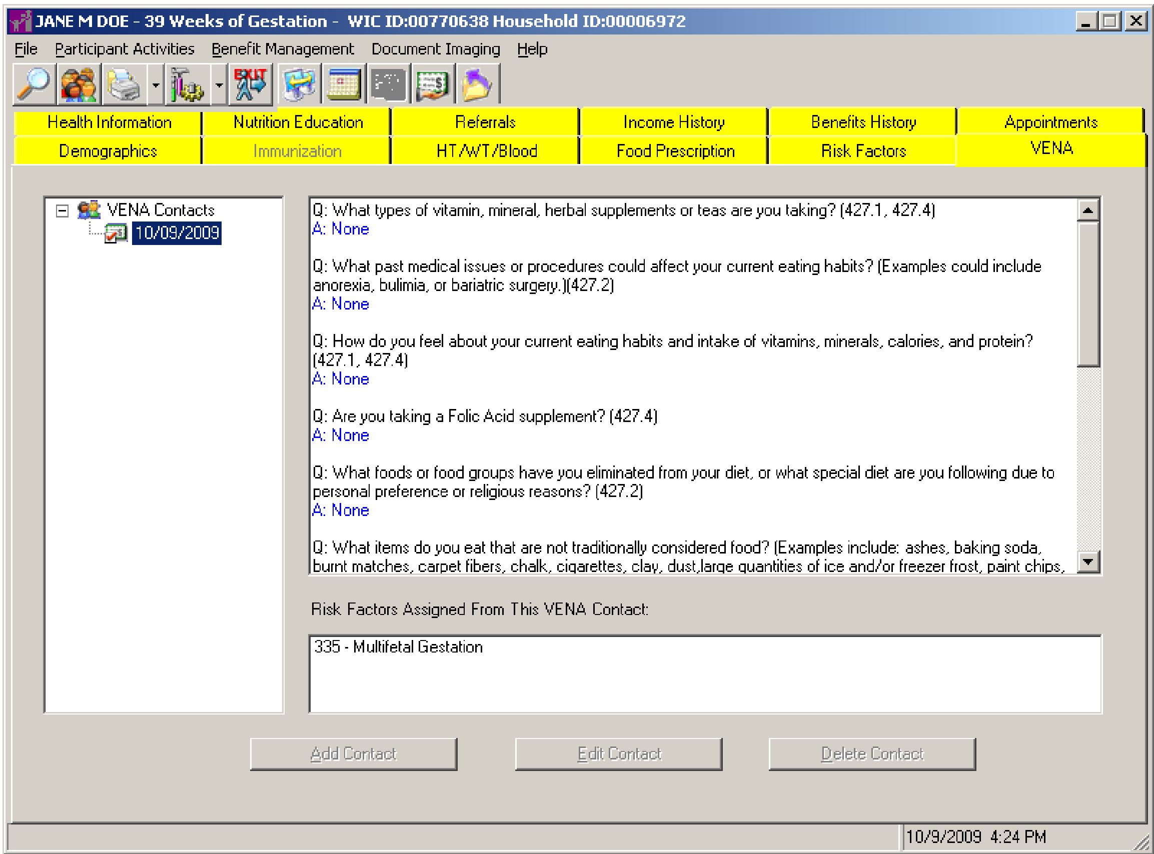


Figure 13 – VENA Panel (Participant Folder)

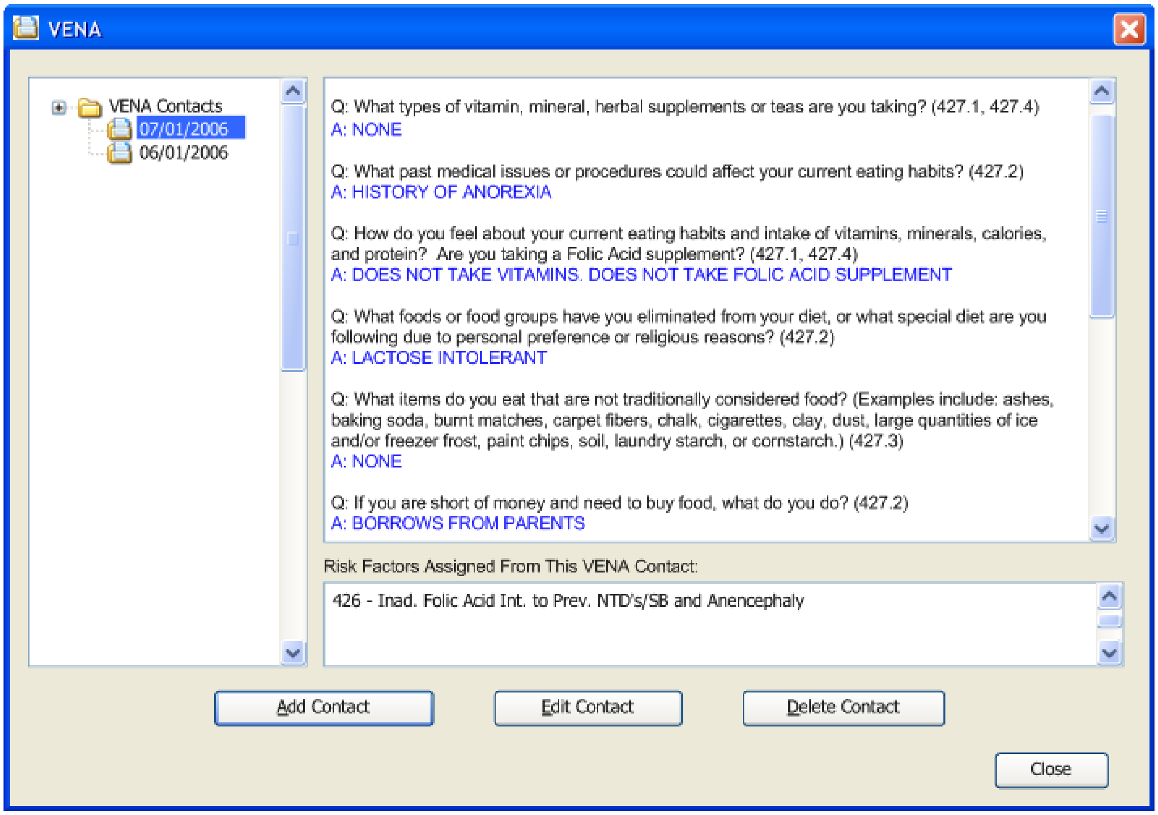


Figure 14 – VENA Panel (Certification Guided Script)

9.9.1 Controls

This section describes the behavior of the controls on the VENA panel.

9.9.1.1 VENA Contacts Tree View

The control allows the user to view the VENA contacts for the participant along with information gathered at the time of the contact including answers to questions and risk factors assigned. The tree view is enabled when the VENA panel is active. It displays data in the following hierarchical structure:

```
VENA Root
  |
  |_VENA Contact Node
```

The panel displays all existing VENA contacts for the participant. If none exist, the root node of the tree displays the text "No VENA contacts exist for this participant." Otherwise, the root node displays the text "VENA Contacts".

VENA contacts displays in chronological order with the most recent contact (determined by the contact date) appearing at the top of the list. The most recent VENA contact is selected. The data values on the tree view are read-only.

9.9.1.2 VENA Contact Tree View Node

This node of the VENA display tree view allows the user to view the date on which the VENA contact took place. The node includes an appropriate icon and VENA contact date in the format of MM/DD/CCYY. Selecting a contact on the tree view refreshes the contact detail and risk factors controls.

9.9.1.3 Contact Detail Text Box

The control allows the user to view the questions posed and answers provided for the selected VENA contact. Questions are prefaced with "Q:" and are displayed in black text. Answers are prefaced with "A:" and are displayed in blue text. There is a blank line between each question/answer pair for readability. All information in the text box is read-only. The questions are loaded from VENAQUESTON.CAPTION for each VENACONTACTITEM.QUESTIONID. The answers are loaded from VENACONTACTITEM.ANSWER.

9.9.1.4 Risk Factors Assigned from this VENA Contact List Box

The control allows the user to view the list of risk factors that were assigned to the participant by the staff member as part of the selected VENA contact. Items in the list are read-only and are formatted as follows:

- [XXXXXX] – [Risk Factor Description]

Where [XXXXXX] is the 6-character alpha-numeric risk factor ID and [Risk Factor Description] is the description of the risk factor. All information in the list box is read-only.

9.9.1.5 Add Contact Button

The control allows the user to add a VENA contact for the participant. Clicking the button invokes the VENA Contact dialog. The Add Contact button is enabled when the VENA tab is active. In the Central Administrative Site and State Office mode, the Add Contact button is not visible. Its mnemonic is "A" and is the default button for the dialog. Upon successfully returning from the VENA Contact dialog (add mode), the new contact is added to the tree view and is automatically selected.

9.9.1.6 Edit Contact Button

The control allows the user to edit a VENA contact for the participant. Clicking the button invokes the VENA Contact dialog for the selected VENA contact. The Edit button is enabled when the VENA tab is active and a VENA contact is selected in the tree view. The VENA contact may be edited from the Participant Folder VENA tab only if the VENA contact was added through the Participant Folder and the edit date is the same date as the date the VENA contact was added and is not associated with a completed Certification for the participant. In the Central Administrative Site and State Office mode, the Edit Contact button is not visible. Its mnemonic is "E". Upon successfully returning from the VENA Contact dialog (Edit mode), the selected contact information is updated to reflect the changes made while editing the contact.

9.9.1.7 Delete Contact Button

The control allows the user to delete a VENA contact for the participant. The Delete Contact button is enabled when the VENA tab is active and a VENA contact record with a contact date equal to the current system date is selected in the tree view and no risk factors were assigned while saving the contact. Prior to deleting the contact, a standard confirmation dialog is invoked to confirm the delete request. The VENA contact may be deleted from the Participant Folder VENA tab only if the VENA contact was added through the Participant Folder and the contact date is the same date as the date the VENA contact was entered and is not associated with a completed Certification for the participant. In the Central Administrative Site and State Office mode, the Delete Contact button is not visible. Its mnemonic is "D".

9.9.1.8 Close Button

Pressing this control dismisses the VENA dialog. Characteristics of the Close button are defined in the Consistencies chapter.

9.9.2 Processes

9.9.2.1 Initializing the Interface

The VENA Contacts tree view displays previously saved VENA contacts in reverse chronological order. The first (most recent) date in the tree view is initially selected. The Contact Detail text box and the Risk Factors list box initially contain the information associated with the VENA contact selected in the tree.

9.9.2.2 Edits

There are no updateable controls on the VENA tab; therefore, there are no edits performed on this panel.

9.9.2.3 Saving the Data

There are no updateable controls on the VENA tab; therefore, no data is written to the database.

9.9.2.4 Add VENA Contact Information

When the Add Contact button is selected, the VENA Contact dialog is invoked in Add mode. If the user does not have the appropriate permissions (VENAContact.Add or .FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to add a VENA contact. Please see the supervisor."

9.9.2.5 Edit VENA Contact Information

When the Edit Contact button is selected, the VENA Contact dialog is invoked in Edit mode. If the user does not have the appropriate permissions (VENAContact.Edit or .FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to edit a VENA contact. Please see the supervisor."

9.9.2.6 Delete VENA Contact Information

When the Delete Contact button is selected, a standard confirmation dialog is invoked with the text, "Are you sure you want to delete the selected VENA Contact?" Yes and No buttons are available. The No button is the default button for the confirmation dialog. If the user does not have the appropriate permissions (VENAContact.Delete or .FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to delete a VENA contact. Please see the supervisor."

9.9.2.7 Data Map

Control	**Table**	**Column**	**Comments**
VENA Contacts	VENACONTACT	CONTACTDATE	Read only
	VENACONTACT	RFASSIGNED	Y if any risk factors were assigned.
Contact Details	(Question Text)VENAQUESTION	(Question Text) CAPTION for the QUESTIONID in VENACONTACTITEM	
Contact Details	(Answer Text)VENACONTACTITEM	(Answer Text) ANSWER	
Risk Factors	VENACONTACTRF	RISKFACTORID	

9.10 Risk Factors Tab

The Risk Factors tab of the Participant Folder allows the user to view the current and past certifications for the participant, and the risk factors associated with the certification. It is invoked when the user selects the Risk Factors in the Participant Folder.

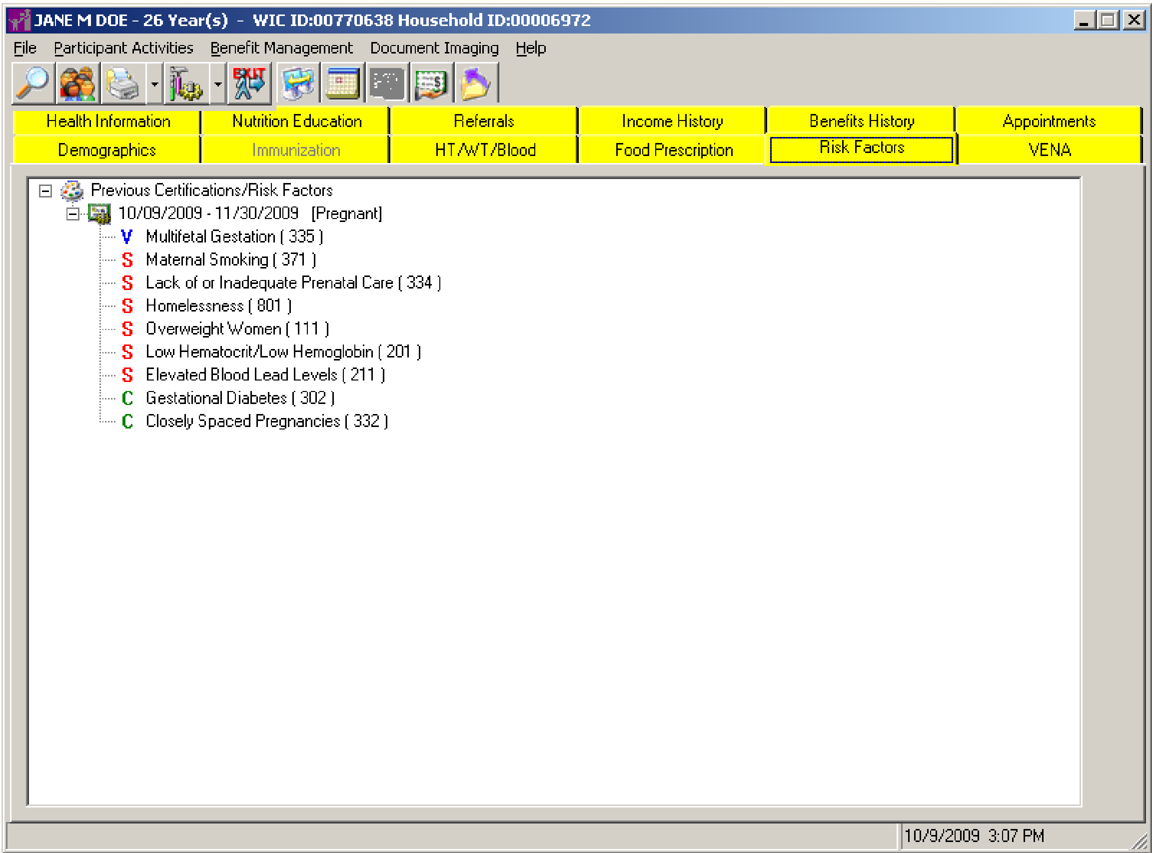


Figure 15 – Risk Factors Tab

9.10.1 Controls

The controls for the Risk Factors tab are defined in Common Interface Panels, Chapter K – Risk Factors.

9.10.2 Processes

There are no processes defined on the Risk Factors tab.

9.11 Food Prescription Tab

The Food Prescription tab of the Participant Folder allows the user to view previous food prescriptions for the participant. It is invoked when the user selects the Food Prescription tab in the Participant Folder.

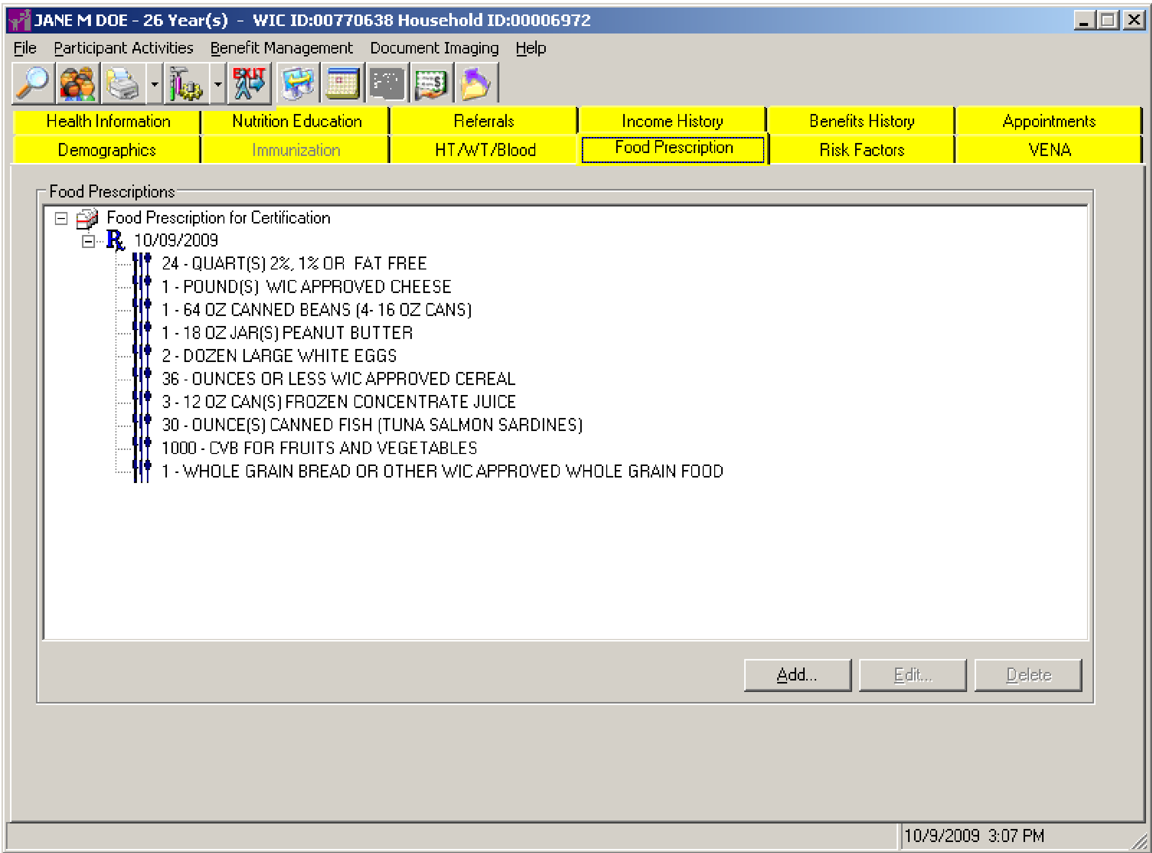


Figure 16 – Food Prescription Tab

9.11.1 Controls

The controls for the Food Prescription tab are defined in Common Interface Panels, Chapter L – Food Prescription.

9.11.2 Processes

The system verifies if there is a certification in progress. If at least one certification is started and not completed, all controls on the Food Prescription Tab are locked. Modifying from the Food Prescription Tab is not allowed until the Certification has been completed. This applies if a record exists for the selected StateWICID in the CertContact table and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

9.12 Nutrition Education Tab

The Nutrition Education tab of the Participant Folder allows the user to view previous nutrition education contacts with the participant, and add additional contacts if necessary. It is invoked when the user selects the Nutrition Education tab in the Participant Folder.

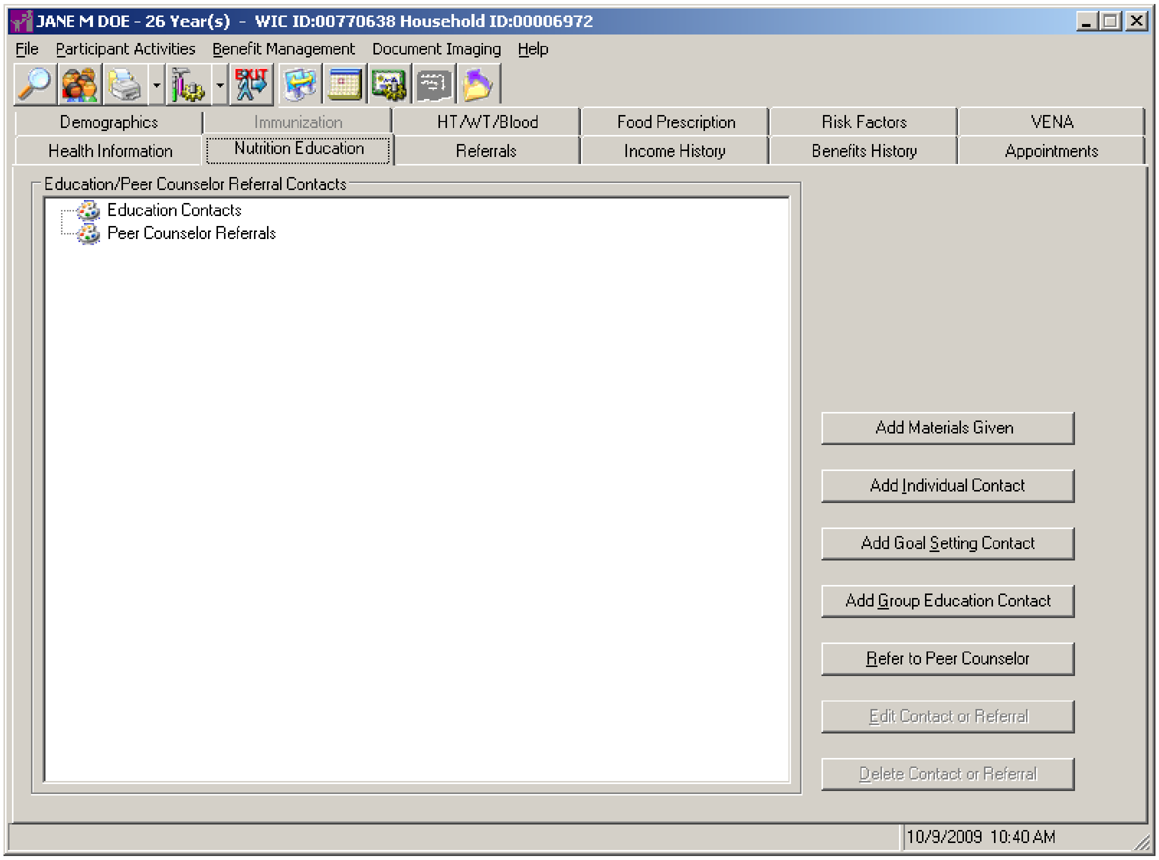


Figure 17 – Nutrition Education Tab

9.12.1 Controls

The controls and functionality for this panel are defined in Common Interface Panels, Chapter N – Nutrition Education and Goal Setting.

9.12.2 Processes

The system verifies if there is a certification in progress. If at least one certification is started and not completed, all controls on the Nutrition Education Tab are locked. Modifying from the Nutrition Education Tab is not allowed until the Certification has been completed. This applies if a record exists for the selected StateWICID in the CertContact table and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

9.13 Benefits History Tab

The Benefits History tab of the Participant Folder allows the user to view the benefits issued to the participant at any Clinic affiliated with the local agency administrative server. Additionally, the user can view the food items on the selected benefit. The Benefits History tab is invoked when the user selects the Benefits History tab in the Participant Folder.

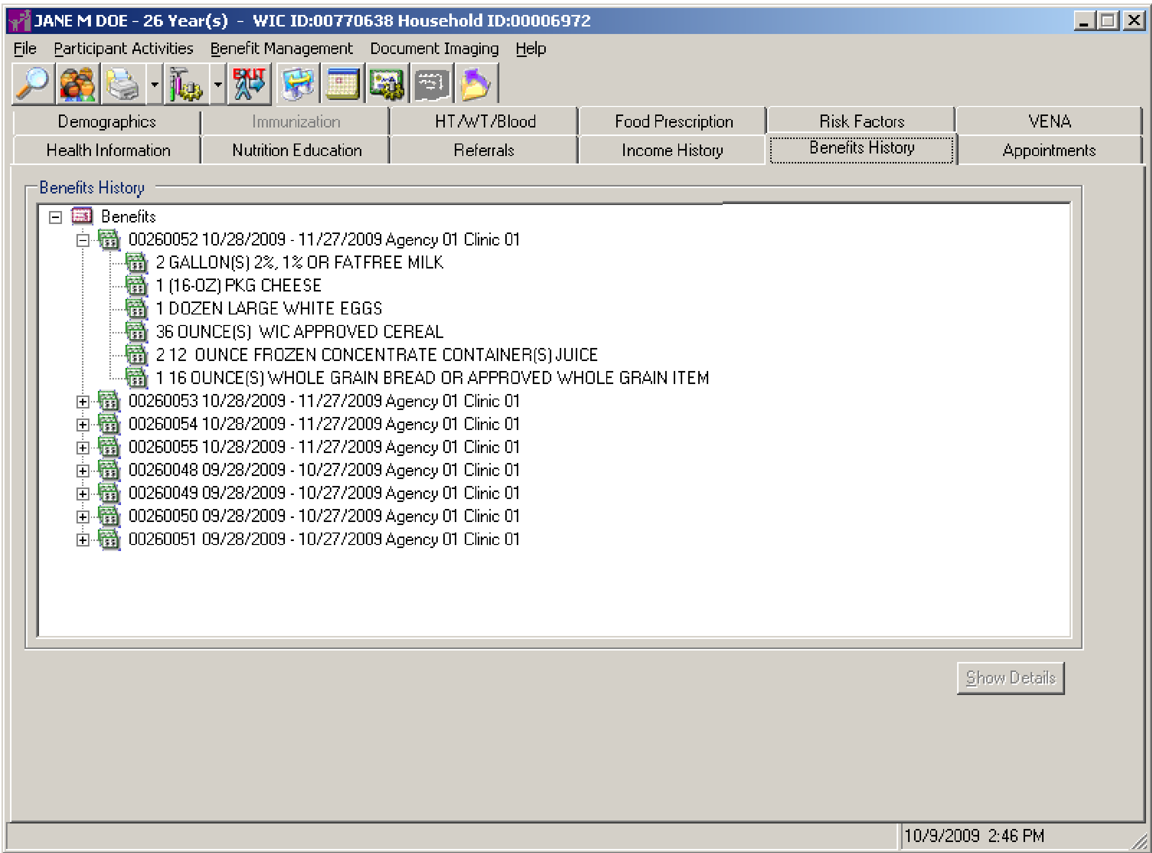


Figure 18 – Benefits History Tab

9.13.1 Controls

This section describes the behavior of the controls on the Benefits History tab of the Participant Folder.

9.13.1.1 Benefits Display Tree View

The control allows the user to view benefits for the participant along with the food items that comprise the food prescription on each benefit. The tree view is enabled when the Benefits History tab is active. It displays data in the following hierarchical structure:

```
Benefits Root
 |
 |_Benefit Node
 | |
 | |__Food Item
 | |__Food Item
```

It is filled with all benefits issued for the participant. The benefits display in reverse chronological order according to the value of the First Date to Use. The most recent benefit node defaults to expanded. The data values on the tree view are read-only.

9.13.1.2 Benefit Tree View Node

This node of the Benefits Display tree view allows the user to view the information on the issued benefit, the agency, and Clinic at which the benefit was issued. The node includes the chequ02E_new.gif icon and text in the format of {benefit number} {first date to use (MM/DD/CCYY)} – {last date to use (MM/DD/CCYY)} Agency {Agency ID} Clinic {Clinic ID}. If the benefit was voided, the node has additional text in the format of VOIDED {voided date}. The most recent benefit node defaults to expanded. All other nodes default to collapsed.

If the EmphasizeMarkedLostStolenChecksOnChecksHistoryTab business rule is set to "Y", benefits that were marked as lost or marked as stolen are indicated by red bolded text indicating that the benefit was "*Marked Lost*" or "*Marked Stolen*" in the benefit node of the Benefits Display tree view.

9.13.1.3 Food Item Tree View Node

This node of the Benefits Display tree view allows the user to view the food items that comprise the food prescription on a benefit. The node includes the chequ02E_new.gif icon and text in the format of {quantity of food item} {description of food item}.

9.13.1.4 Show Details Button

The Show Details button is enabled when the Benefits History tab is active and a Benefit tree view node is selected in the Benefits Display tree view. Its mnemonic is "S".

9.13.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Benefits History tab.

9.13.2.1 Initializing the Interface

Benefit node – The node includes the chequ02E_new.gif icon and text in the format of {benefit number} {first date to use (MM/DD/CCYY)} – {last date to use (MM/DD/CCYY)} Agency {Agency ID} Clinic {Clinic ID}. If the benefit was voided, the node has additional text in the format of VOIDED {voided date}.

Food Item node – The node includes the chequ02E_new.gif icon and text in the format of {quantity of food item} {description of food item}.

The most recent benefit node defaults to expanded. All other nodes default to collapsed.

9.13.2.2 Edits

There are no edits performed on the Benefits History tab.

9.13.2.3 Saving the Data

There are no updateable controls on the Benefits History tab; therefore, no data is written to the database.

9.13.2.4 Show Benefit Details

When the Show Details button is selected, the Benefit Details dialog defined in this document is invoked.

9.14 Benefit Details

The Benefit Details dialog allows the user to view the detail information about a benefit. It is invoked when the user selects the Show Details button on the Benefits History tab.

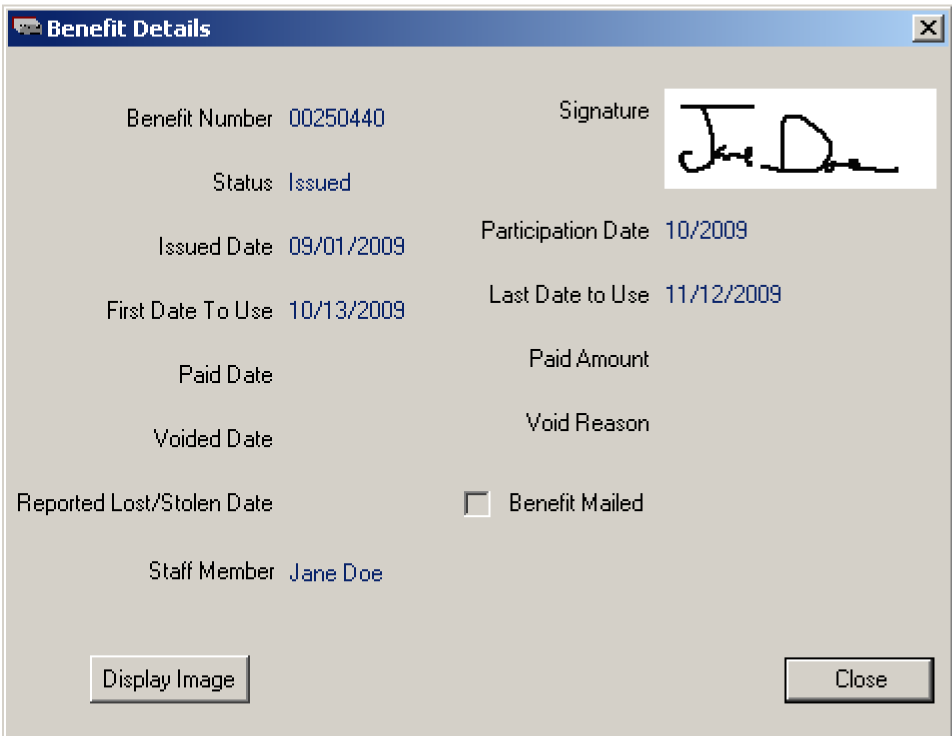


Figure 19 – Benefit Details Dialog

9.14.1 Controls

This section describes the behavior of the controls on the Benefit Details dialog.

9.14.1.1 Benefit Number Text and Value Label

The control allows the user to view the benefit number of the food instrument. The value label is populated with the value of the Serial-No attribute of the FOOD-INSTRUMENT table. It displays in the inverse color of the dialog.

9.14.1.2 Electronic Signature Picture Box and Value Label (Signature)

The control allows the user to view the electronic signature for the participant as it was captured on the digital signature pad. The value in the control is read-only.

9.14.1.3 Status Text and Value Label

The control allows the user to view the current status of the benefit. The value label is populated with one of the following values that represent the current status of the benefit:

- REDEEMED
- VOIDED
- STOLEN
- EXPIRED
- ISSUED

It displays in the inverse color of the dialog.

9.14.1.4 Issued Date Text and Value Label

The control allows the user to view the issued date of the benefit. The value label is populated with the value of the Issued-Date attribute of the FOOD-INSTRUMENT-SET table. It displays in the inverse color of the dialog. If the information is not available, the value label is blank.

9.14.1.5 Participation Date Text and Value Label

The control allows the user to view the participation date of the benefit. The value label is populated with the value of the Participation-Date attribute of the FOOD-INSTRUMENT-SET table. It displays in the inverse color of the dialog. If the information is not available, the value label is blank.

9.14.1.6 First Date to Use Text and Value Label

The control allows the user to view the first date to use of the benefit. The value label is populated with the value of the First-Use-Date attribute of the FOOD-INSTRUMENT-SET table. It displays in the inverse color of the dialog. If the information is not available, the value label is blank.

9.14.1.7 Last Date to Use Text and Value Label

The control allows the user to view the last date to use of the benefit. The value label is populated with the value of the Last-Use-Date attribute of the FOOD-INSTRUMENT-SET table. It displays in the inverse color of the dialog. If the information is not available, the value label is blank.

9.14.1.8 Paid Date Text and Value Label

The control allows the user to view the paid date of the benefit. The value label is populated with the value of the Paid-Date attribute of the FOOD-INSTRUMENT table. It displays in the inverse color of the dialog. If the information does not apply to the current status of the benefit, the value "N/A" is displayed.

9.14.1.9 Paid Amount Text and Value Label

The control allows the user to view the paid amount of the benefit. The value label is populated with the value of the Paid-Amt attribute of the FOOD-INSTRUMENT table. It displays in the inverse color of the dialog. If the information applies to the current status of the benefit, the value displays in the "$#####.##" format. If the information does not apply to the current status of the benefit, the value "N/A" is displayed.

9.14.1.10 Voided Date Text and Value Label

The control allows the user to view the date that the benefit was voided. The value label is populated with the value of the Voided-Date attribute of the FOOD-INSTRUMENT table. It displays in the inverse color of the dialog. If the information does not apply to the current status of the benefit, the value "N/A" is displayed.

9.14.1.11 Void Reason Text and Value Label

The control allows the user to view the reason that the benefit was voided. The value label is populated from the appropriate value in the reference dictionary table of the lookup database for the Void-Reason attribute of the FOOD-INSTRUMENT table. It displays in the inverse color of the dialog. If the information does not apply to the current status of the benefit, the value "N/A" is displayed.

9.14.1.12 Reported Stolen Date Text and Value Label

The control allows the user to view the date that the benefit was reported as stolen. The value label is populated with the value of the Reported-Stolen-Date attribute of the FOOD-INSTRUMENT table. It displays in the inverse color of the dialog. If the information does not apply to the current status of the benefit, the value "N/A" is displayed.

9.14.1.13 Benefit Mailed Check Box

The control indicates that the benefit was mailed to the participant. The check box is disabled when the Benefit Details dialog is active.

9.14.1.14 Staff Member Text Label and Value Label

The control allows the user to view the name of the staff member who issued the benefit. It displays in the inverse color of the dialog. If the information is not available, the value label is blank.

9.14.1.15 Display Image Button

This control allows the user to view an image of the benefit from the banking system. The Display Image button is enabled when the Benefit Details dialog is active and the CLN_EnableCheckImagePreview business rule is set to "Y". It does not have a mnemonic.

9.14.1.16 Close Button

The Close button is enabled when the Benefit Details dialog is active. Characteristics for the Close button are defined in the Consistencies chapter.

9.14.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Benefit Details dialog.

9.14.2.1 Initializing the Interface

Upon initial display of the dialog, the following occurs:

- The title bar text is set to "Benefit Details".
- All fields display the information for the benefit selected on the Benefits History Tab.

9.14.2.2 Edits

There are no edits defined for this dialog.

9.14.2.3 Display Benefit Image

When the Display Image button is selected, the Display Benefit Image dialog defined in this document is invoked.

9.15 Display Benefit Image

The Display Benefit Image dialog allows the user to view the detail information about a benefit. It is invoked when the user selects the Display Image button on the Benefit Details dialog.

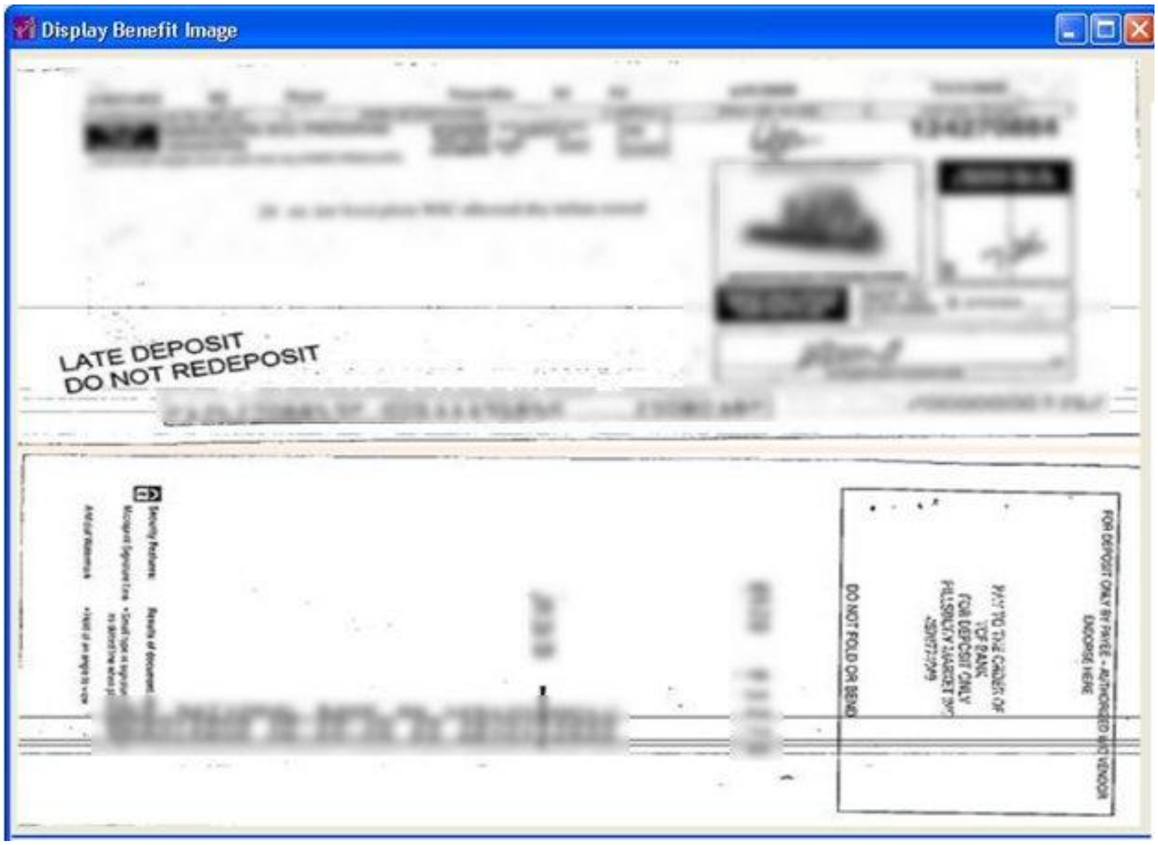


Figure 20 – Display Benefit Image Dialog

9.15.1 Controls

There are no controls on this dialog.

9.15.2 Processes

There are no processes for this dialog.

9.16 Immunizations Tab

The Immunizations tab allows the user to view a listing of the immunizations that the participant has received. The user is able to add immunization records to the Participant Folder, delete immunization records, or edit any immunization records entered by the WIC program. The Immunizations tab also allows the user to print a Vaccine Coverage Report defined in System Outputs Chapter 01 – System Outputs. The Immunizations tab is invoked when the user selects the Immunizations tab in the Participant Folder.

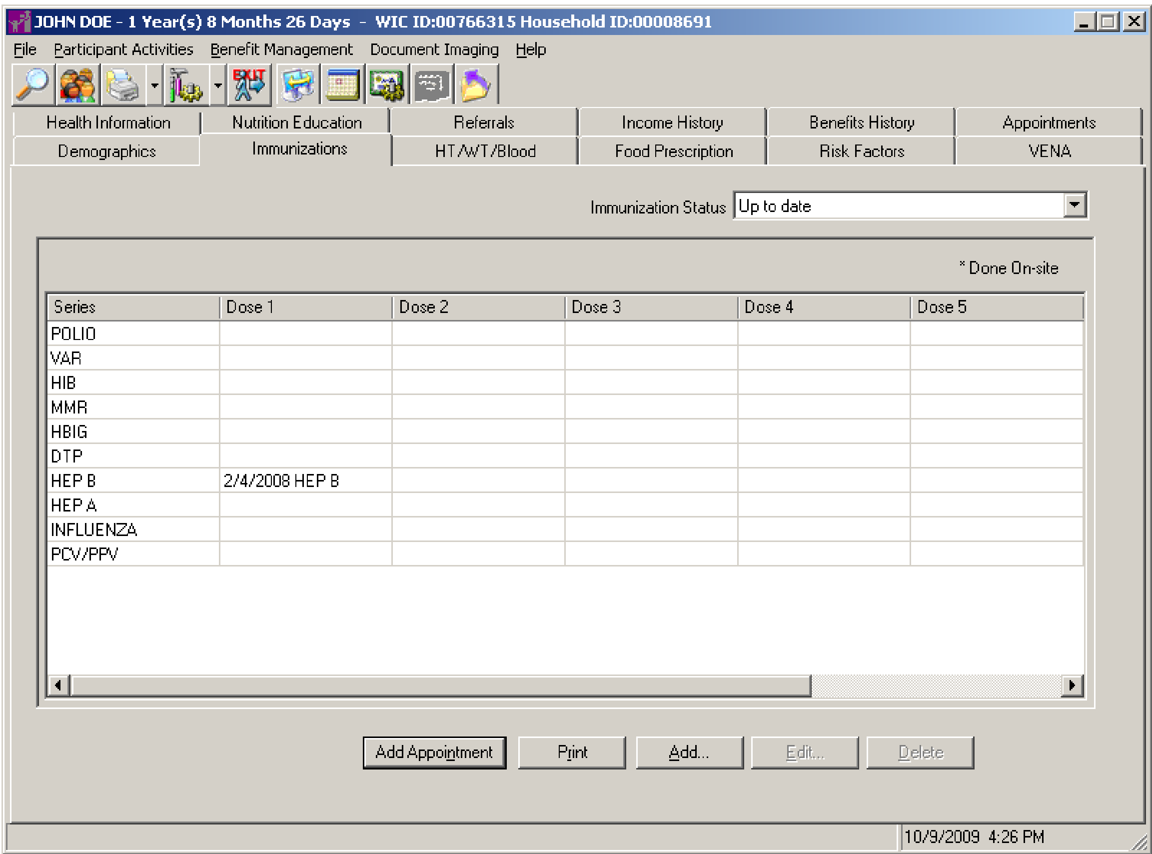


Figure 21 – Immunizations Tab

9.16.1 Controls

The controls for the Immunization tab are defined in Common Interface Panels, Chapter I – Immunizations.

9.16.2 Processes

The system verifies if there is a certification in progress. If at least one certification is started and not completed, all controls **with the exception of the Print button** on the Immunizations Tab are locked. Modifying from the Immunizations Tab is not allowed until the Certification has been completed. This applies if a record exists for the selected StateWICID in the CertContact table and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

9.17 Referrals Tab

The Referrals tab of the Participant Folder allows the user to view the previous referrals of the participant to agencies external to WIC and add new referrals. Additionally, the user may view and adjust the other programs in which the participant participates. The Referrals tab is invoked when the user selects the Referrals tab in the Participant Folder.

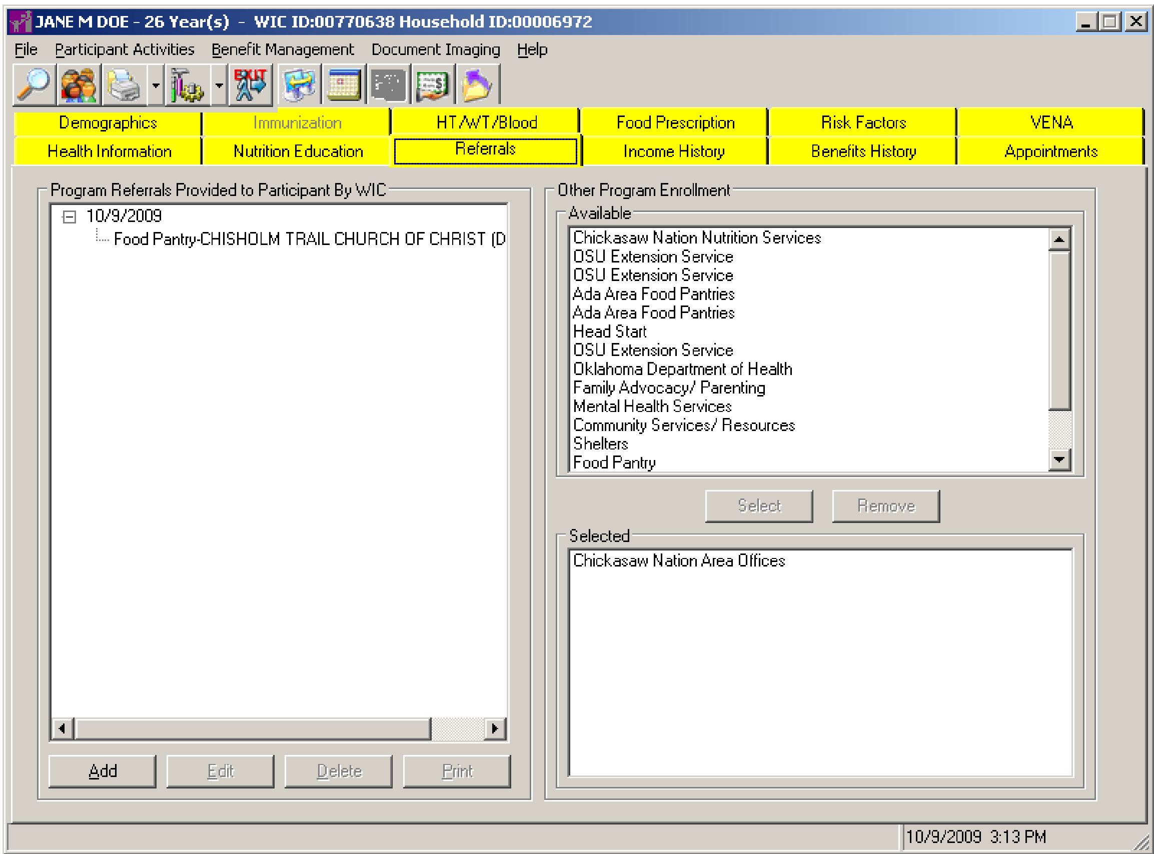


Figure 22 – Referrals Tab

9.17.1 Controls

The controls and functionality for this panel are defined in Common Interface Panels, Chapter M – Referrals.

9.17.2 Processes

The system verifies if there is a certification in progress. If at least one certification is started and not completed, all controls on the Referrals Tab are locked. Modifying from the Referrals Tab is not allowed until the Certification has been completed. This applies if a record exists for the selected StateWICID in the CertContact table and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

9.18 Health Information Tab (Infant/Child)

The Health Information tab displays Health Information specific to the WIC Category of the participant. The folder tab loads the panel and controls on this tab defined in Common Interface Panels, Chapter E – Health Information.

If the Health Information Tab is invoked in the Participant Folder and the participant being processed is an **infant** or a **child**, the following panel is loaded.

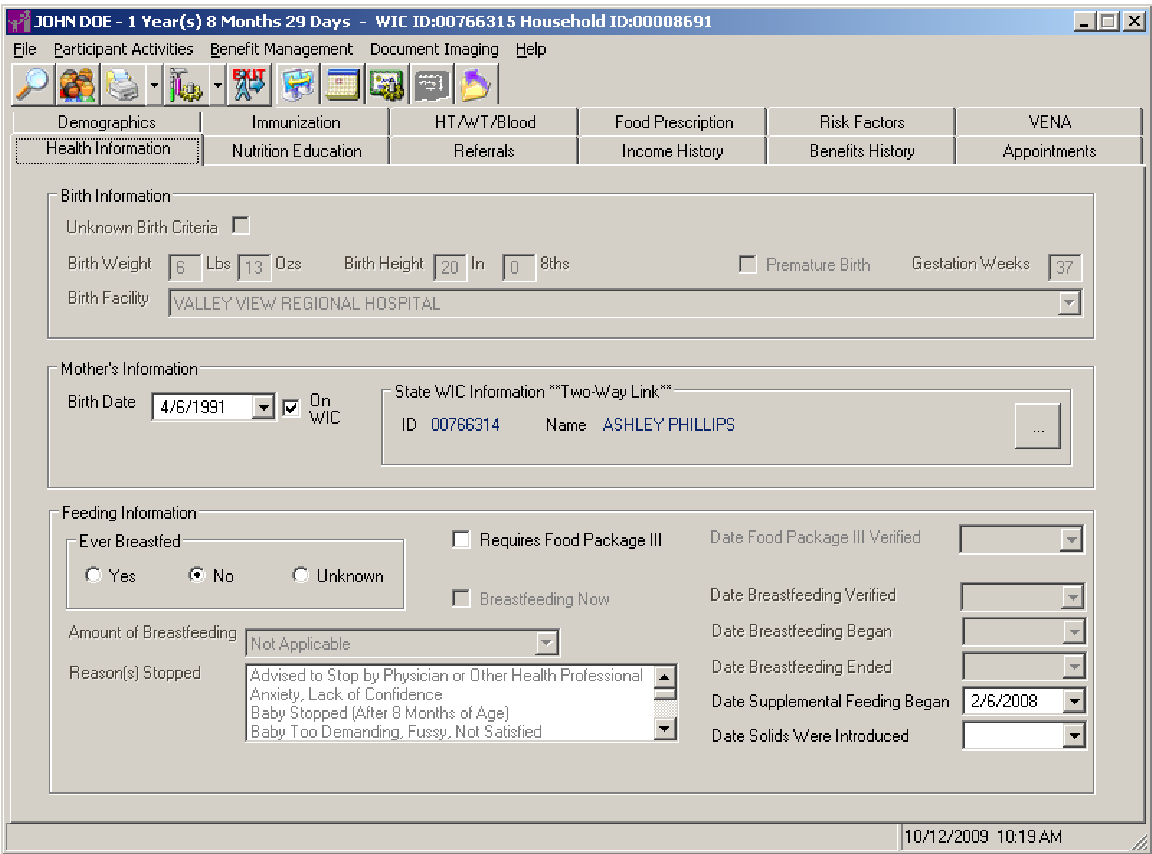


Figure 23 – Health Information Tab (Infant/Child)

9.18.1 Controls

The controls and functionality for this panel are defined on Health Information (Infant, Child) in Common Interface Panels, Chapter E – Health Information.

9.18.2 Processes

The system verifies if there is a certification in progress. If at least one certification is started and not completed, all controls on the Health Information Tab are locked. Modifying from the Health Information Tab is not allowed until the Certification has been completed. This applies if a record exists for the selected StateWICID in the CertContact table and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

9.19 Health Information Tab (Woman – Pregnancy Info Sub-tab)

The Health Information tab displays Health Information specific to the WIC Category of the participant. The folder tab loads the panel and controls on this tab defined in Common Interface Panels, Chapter E – Health Information.

If the Health Information Tab is invoked in the Participant Folder and the participant being processed is a **pregnant** woman, the following panel is loaded.

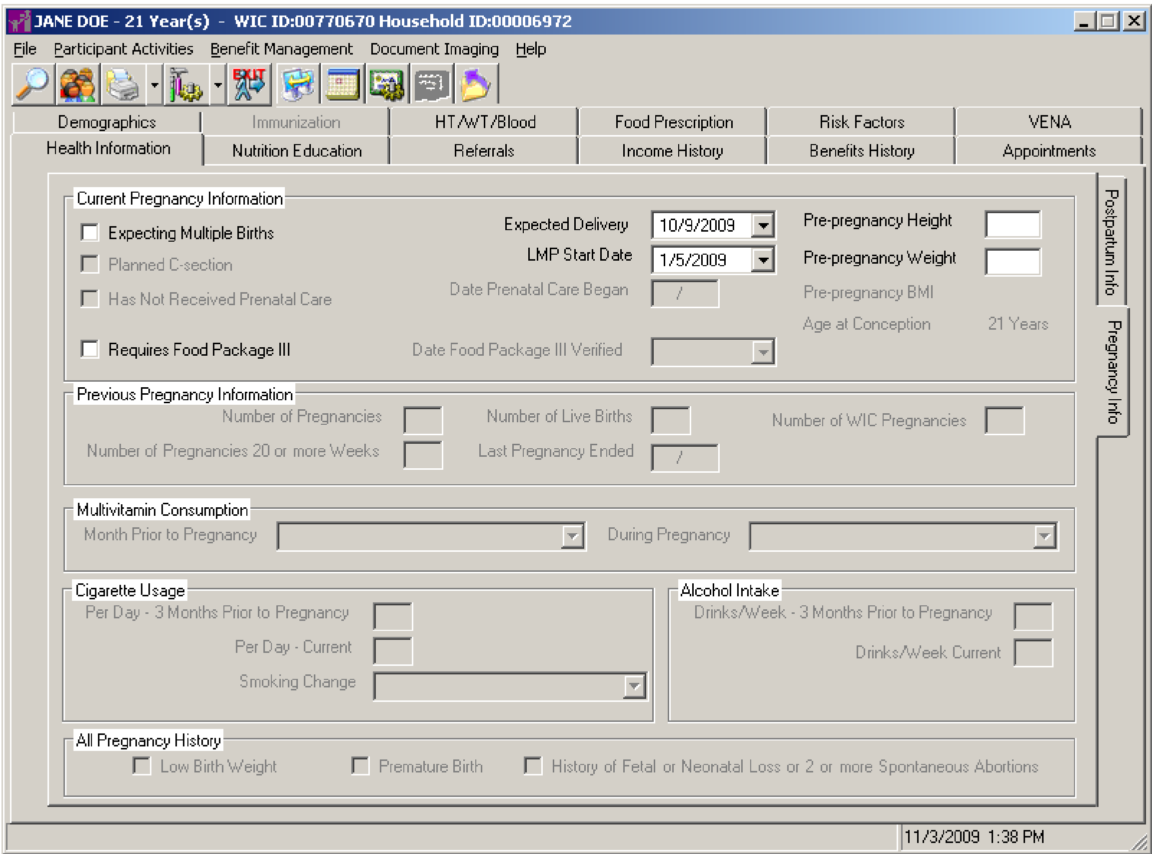


Figure 24 – Health Information Tab (Woman – Pregnancy Info Sub-tab)

9.19.1 Controls

The controls and functionality for this panel are defined on Health Information (Pregnancy) in Common Interface Panels, Chapter E – Health Information.

9.19.2 Processes

The system verifies if there is a certification in progress. If at least one certification is started and not completed, all controls on the Health Information Tab are locked. Modifying from the Health Information Tab is not allowed until the Certification has been completed. This applies if a record exists for the selected StateWICID in the CertContact table and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

9.20 Health Information Tab (Woman – Postpartum Info Sub-tab)

The Health Information tab displays Health Information specific to the WIC Category of the participant. The folder tab loads the panel and controls on this tab defined in Common Interface Panels, Chapter E – Health Information.

If the Health Information Tab is invoked in the Participant Folder and the participant being processed is a postpartum woman (**breastfeeding** or **non-breastfeeding**), the following panel is loaded.

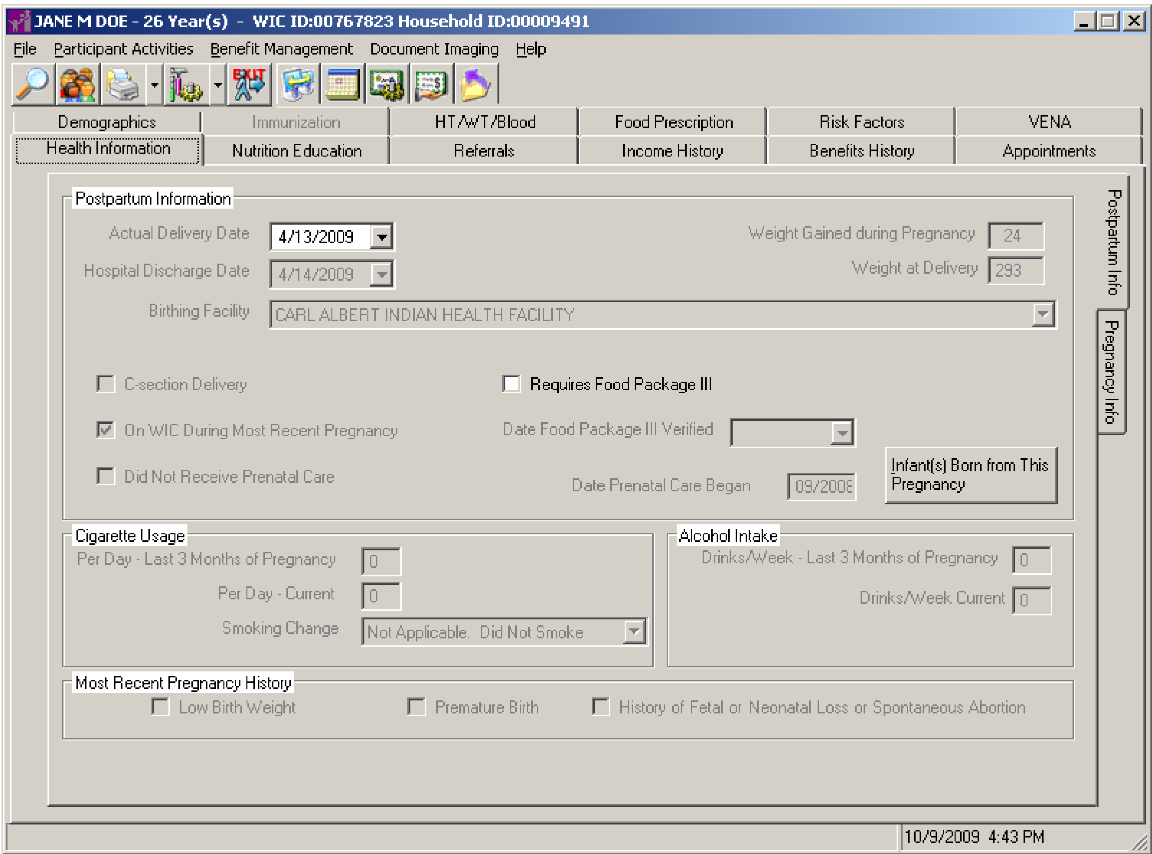


Figure 25 – Health Information Tab (Woman – Postpartum Info Sub-tab)

9.20.1 Controls

The controls and functionality for this panel are defined on Health Information (Postpartum) in Common Interface Panels, Chapter E – Health Information.

9.20.2 Processes

The system verifies if there is a certification in progress. If at least one certification is started and not completed, all controls on the Health Information Tab are locked. Modifying from the Health Information Tab is not allowed until the Certification has been completed. This applies if a record exists for the selected StateWICID in the CertContact table and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

9.21 Income History Tab

The Income History tab of the Participant Folder allows the user to view previous income screening contact information for members of the household. It is invoked when the user selects the Income History tab in the Participant Folder.

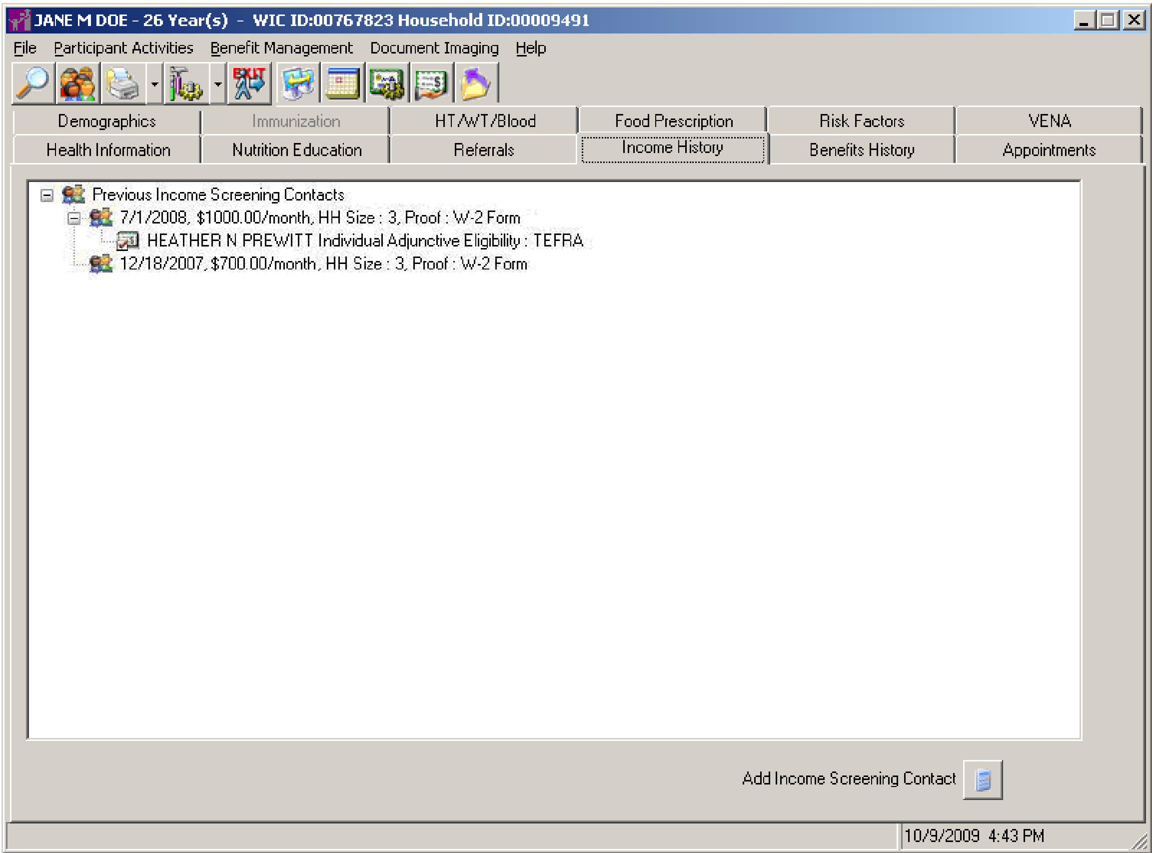


Figure 26 – Income History Tab

9.21.1 Controls

This section describes the behavior of the controls on the Income History tab.

9.21.1.1 Income Screening Contact Display Tree View

The Income Screening Contact Display Tree View is enabled when the Income History tab is active. This Income Screening Contact Display tree view control is defined on in Common Interface Panels, Chapter D – Income Calculator.

9.21.1.2 Add Income Screening Contact Button

The Add Income Screening Contact button is enabled when the Income History Tab is active. It has ToolTip text of "Income Calculator".

9.21.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Income History tab.

9.21.2.1 Initializing the Interface

The Income Screening Contact Display tree view displays all existing income screening contacts for the household. The previously saved income screening contacts displays in reverse-chronological order by the value of the Income Screening Contact Date.

The most recent Household Contact Date node defaults to expanded. All other nodes default to collapsed.

9.21.2.2 Edits

When the Add Income Screening Contact button is selected, if the user does not have the appropriate permissions (Income History.Add or .FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to add an income screening contact. Please see the supervisor."

9.21.2.3 Add Income Screening Contact

When the Add Income Screening Contact button is selected, the Income Calculator dialog defined in Common Interface Panels Chapter D – Income Calculator is invoked.

9.21.2.4 Saving the Data

There are no updateable controls on the Income History tab; therefore no data is written to the database.

9.22 Appointments Tab

The Appointments tab of the Participant Folder allows the user to view appointments scheduled for all members of a household. The Appointments tab is invoked when the user selects the Appointments tab in the Participant Folder.

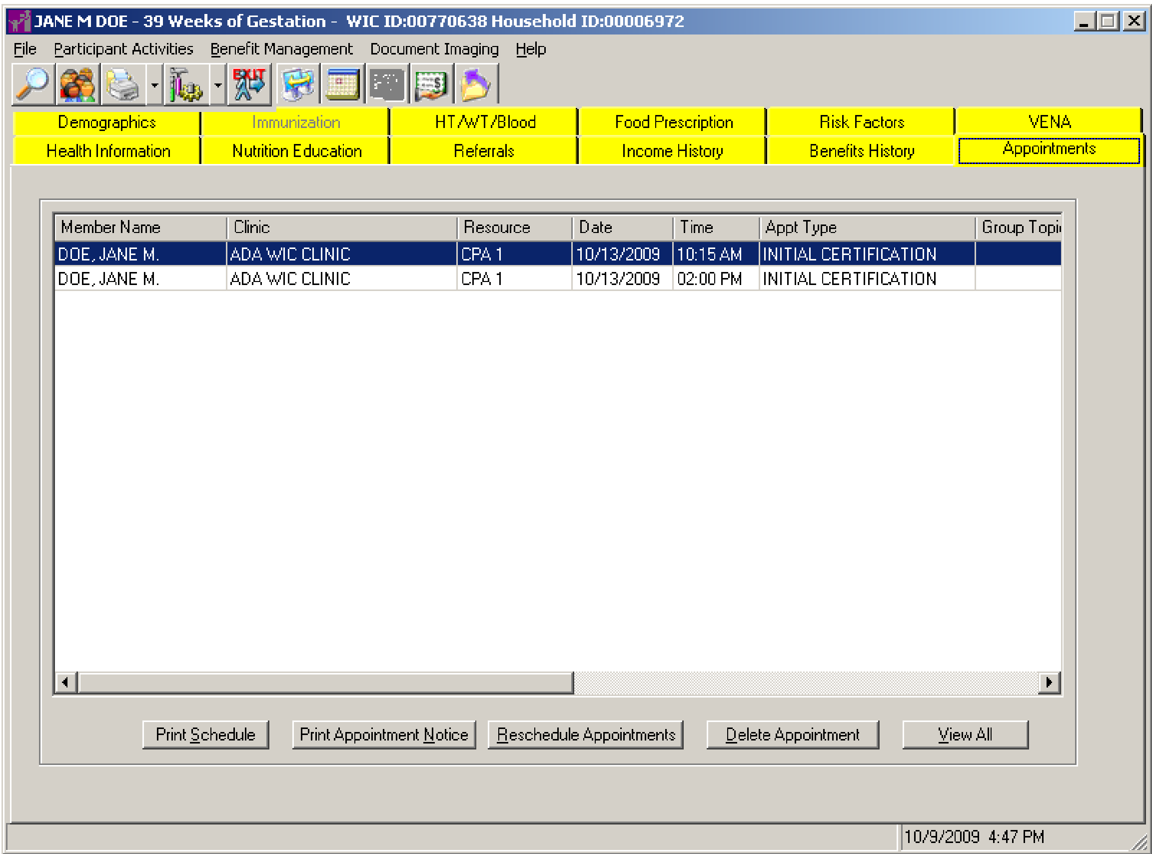


Figure 27 – Appointments Tab

9.22.1 Controls

The controls on the Appointments tab are defined in Clinic, Chapter 08 – Appointment Scheduling.

9.22.2 Processes

The processes on the Appointments tab are defined in Clinic, Chapter 08 – Appointment Scheduling.

9.23 Certification History Tab

The Certification History tab of the Participant Folder allows the user to view all previous certifications for a participant and the staff member who completed each step of the certification process. It is invoked when the user selects the Certification History tab in the Participant Folder.

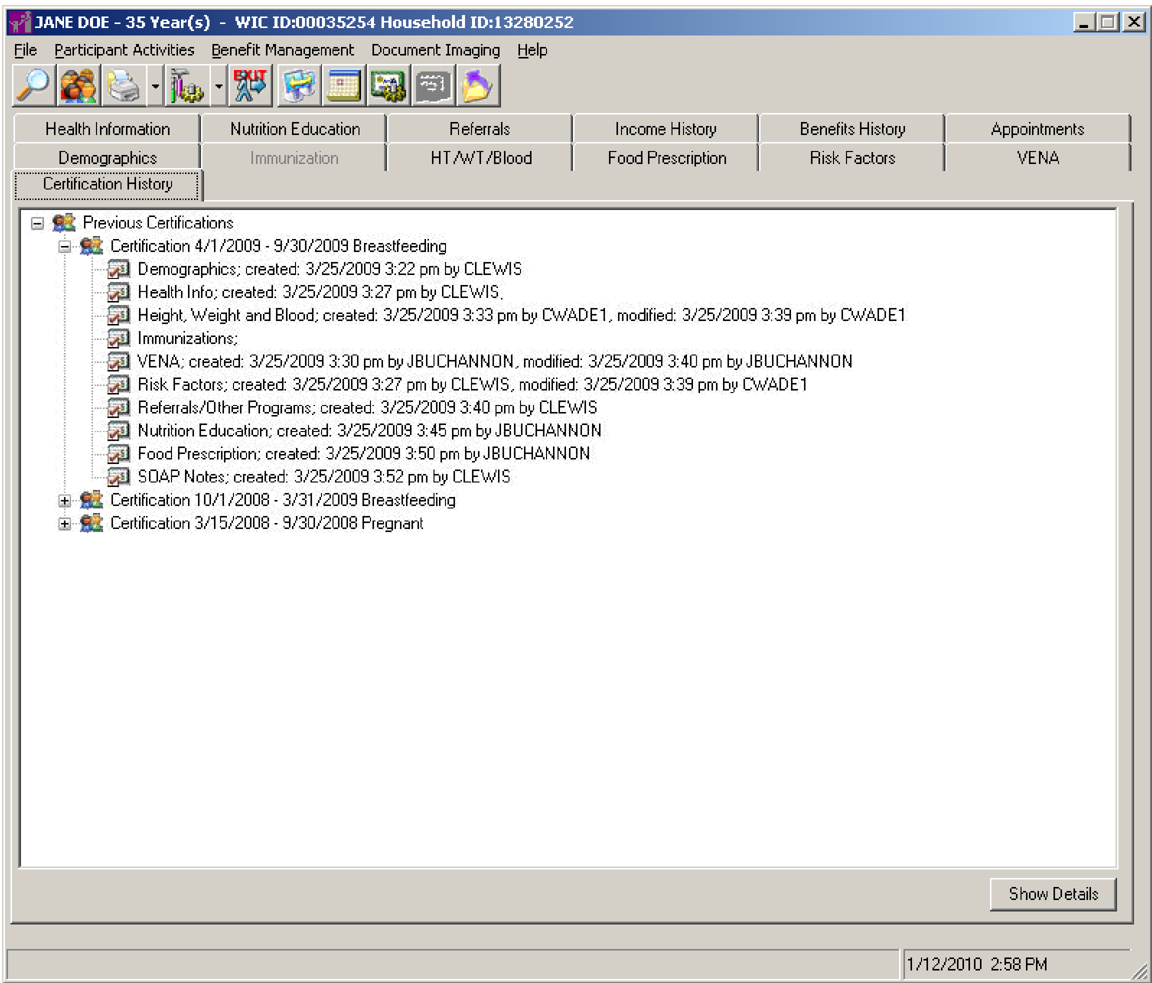


Figure 28 – Certification History Tab

9.23.1 Controls

This section describes the behavior of the controls on the tab.

9.23.1.1 Previous Certifications Tree View

This control allows the user to view the certifications for the participant. The tree view is enabled when the tab is active. It displays data in the following hierarchical structure:

```
Previous Certifications Root
```

```
|
|_Previous Certification Node
| |
| |_Certification Area Node
| |_Certification Area Node
|
|_Previous Certification Node
```

The data values on the tree view are read-only.

9.23.1.1.1 Previous Certification Tree View Node

This node allows the user to view the certification period and the participant's WIC status during the certification period. The node includes an appropriate icon and text in the format of "Certification {certification period start date MM/DD/CCYY)} – {certification period end date MM/DD/CCYY)} {WIC status}". The most recent certification period node defaults to expanded.

9.23.1.1.2 Certification Area Tree View Node

This node allows the user to view the certification area completed, the date and time on which the certification area was completed, and the staff ID of the staff member who completed the certification area. The node includes an appropriate icon and text in the format of "{certification area}; created {date completed (MM/DD/CCYY) time completed (HH:MM am/pm)} by {staff ID}".

9.23.1.2 Show Details Button

This control allows the user to view the details of a certification period. The Show Details button is enabled when the Certification History tab is active and a certification period has been selected in the Previous Certifications tree view.

9.23.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Income History tab.

9.23.2.1 Initializing the Interface

The Previous Certifications tree view displays all previous certification periods for the participant. The certification periods displays in reverse-chronological order by the value of the certification period date range.

The most recent Previous Certification node defaults to expanded. All other nodes default to collapsed.

9.23.2.2 Edits

None of the controls on this window participate in cross edits.

9.23.2.3 Show Certification Details

When the Show Details button is selected, the Certification Details dialog defined in section 9.38 of this document is invoked.

9.23.2.4 Saving the Data

There are no updateable controls on the tab; therefore no data is written to the database.

9.24 Assign Risk Factors (Process)

This process determines if the participant qualifies for additional system-assigned risk factors based upon the entered data. The process does not remove a system-assigned risk factor that was previously assigned to their certification. It is invoked in response to the following user actions:

- Leaving the Demographics sub-tab of the Demographics tab and initiating the process for the tab defined in Common Interface Panels, Chapter A – Demographic Information Panels.
- Leaving the Additional Info 1 sub-tab of the Demographics tab and initiating the process for the tab defined in Common Interface Panels, Chapter A – Demographic Information Panels.
- Leaving the Additional Info 2 sub-tab of the Demographics tab and initiating the process for the tab defined in Common Interface Panels, Chapter A – Demographic Information Panels.
- Selection of the OK button on the Height/Weight Measurement Entry dialog, defined in Common Interface Panels, Chapter G – Height Weight Bloodwork.
- Selection of the OK button on the Blood Measurement Entry dialog defined in Common Interface Panels, Chapter G – Height Weight Bloodwork.

When the Assign Risk Factors process is invoked the system performs the following steps:

- Determine all of the system-assigned risk factors that are active (where the current system date falls within their active and inactive dates, inclusive).
- Determine all of the system-assigned risk factors that should be assigned to the participant based upon their current information.
- Compare the list of system-assigned risk factors to the risk factors on their current certification and identify any risk factors that should be added.
- If any system-assigned risk factors should be added then determine if the participant is already categorized as High Risk. If not, then determine if they should now be categorized as High Risk due to the additional risk factors.
- If any system-assigned risk factors should be added then determine if the certification priority of the participant should be increased due to the additional risk factors.

- Check if a certification record already exists for the participant with a start date that is equal to the current system date. If the record exists then update its list of risk factors with the additional system-assigned risk factors. If the participant should be categorized as High Risk due to the additional risk factors then update the participant's information to indicate this. If the priority of the participant should be increased due to the additional risk factors then update the priority on the existing certification record.
- If a certification record does not exist with a start date equal to the current system date then create a new certification record for the participant with the list of risk factors from their current certification record plus the additional system-assigned risk factors. The new certification has the same end date as the current certification, and the current system date is used as both the start and effective dates. Then update the current certification record so its end date is the current system date (certifications cannot overlap dates). Also update the participant's information with the start date of the new certification record. If the participant should be categorized as High Risk due to the additional risk factors then update the participant's information to indicate this. If the priority of the participant should be increased due to the additional risk factors then use the higher priority on the new certification record.

9.25 Certification Risk Factors

The Certification Risk Factors dialog allows the user to view the risk factors that are assigned to the current certification and add risk factors that are available or remove the risk factors that were previously assigned by the system. It is invoked when the user selects the Assign Risk Factors menu item defined in this document.

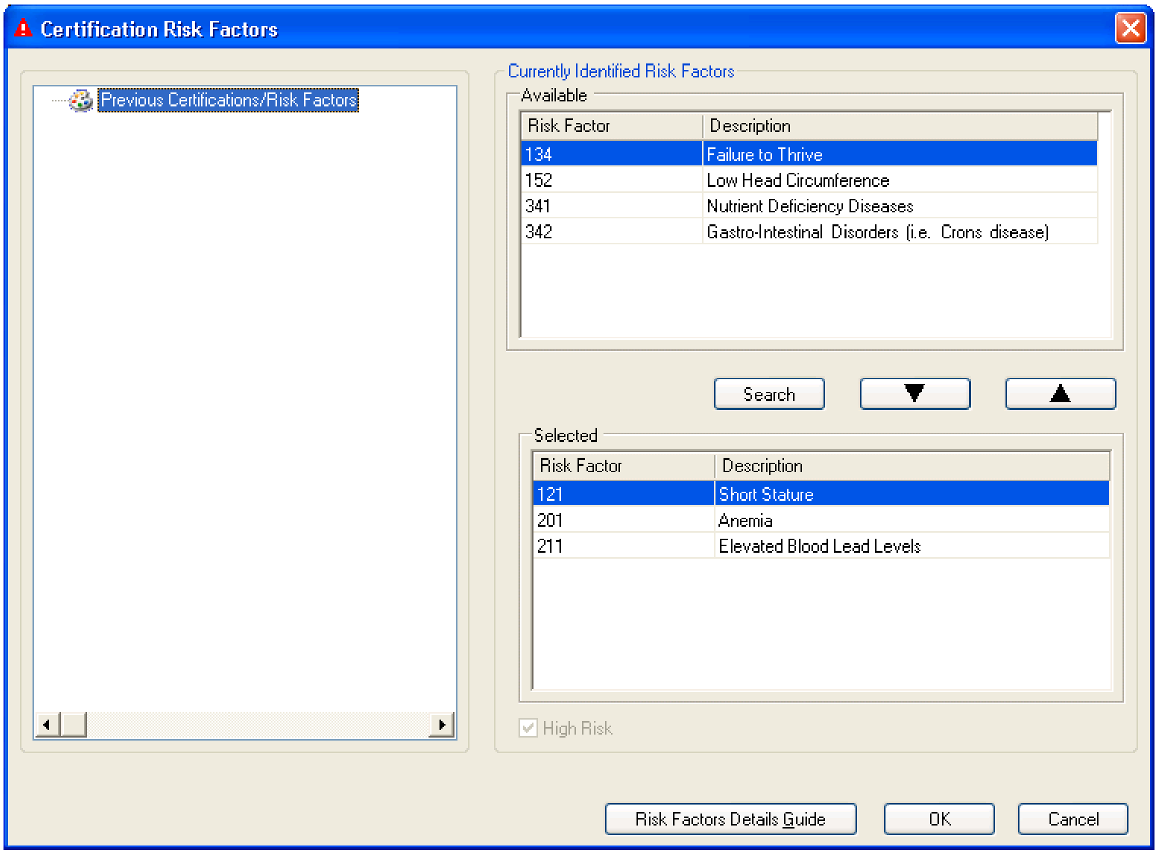


Figure 29 – Certification Risk Factors Dialog

9.25.1 Controls

9.25.1.1 Available Risk Factors Display Grid (Available)

The control allows the user to view the CPA-determined risk factors that are active and available but have not been selected. It also allows the user to view the risk factors that can be assigned by either the CPA or the system but have not been assigned to the current certification attempt. The display grid is enabled when the Certification Risk Factors dialog is active. It includes the following columns:

- Risk Factor
- Description

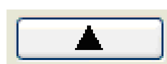
An entry is added to the grid for each CPA-determined risk factor that is active (where the current system date falls within the active and inactive dates, inclusive), available for the WIC Category of the participant, and has not been assigned to the current certification attempt. An entry is also added to the grid for each risk factor that can be assigned by either the CPA or the system that is active but has not been assigned to the current certification attempt. A risk factor is only shown in one list on the form and is never shown in both grid lists. The values on the grid are read-only.

9.25.1.2 Search Button

The control allows the user to search for a risk factor in the Available Risk Factors display grid. The Search button is enabled when the Certification Risk Factors dialog is active. Its mnemonic is "S".

9.25.1.3 Select Button 

The control allows the user to add the selected risk factor from the Available Risk Factors display grid to the Selected Risk Factors display grid. The Select button is enabled when an entry is selected in the Available Risk Factors display grid. It has no mnemonic and does not have a shortcut key.

9.25.1.4 Remove Button 

The control allows the user to remove the selected risk factor in the Selected Risk Factors display grid and place it back in the Available Risk Factors display grid. The Remove button is enabled when an entry is selected in the Selected Risk Factors display grid that has been added by a CPA. The Remove button is disabled when an entry is selected in the Selected Risk Factors display grid that was added by the system based upon the participant information. It has no mnemonic and does not have a shortcut key.

9.25.1.5 Selected Risk Factors Display Grid (Selected)

The control allows the user to view the risk factors that have been selected for the current certification attempt. The display grid is enabled when the Certification Risk Factors dialog is active. It includes the following columns:

- Risk Factor
- Description

An entry is added to the grid for each risk factor (system-determined and CPA-determined) assigned to the current certification attempt. A risk factor is only shown in one list on the form and is never shown in both grid lists. The values on the grid are read-only.

9.25.1.6 High Risk Check Box

The control allows the user to indicate that the participant is considered to be high risk. The check box is marked and disabled when a risk factor in the Selected Risk Factors display grid indicates high risk. The check box is enabled and unchecked when there are no risk factors in the Selected Risk Factors display grid that indicate high risk.

9.25.1.7 Risk Factors Detail Guide Button

The control allows the user to view the Risk Factors Detail Guide section of the on-line help function. The Risk Factors Detail Guide button is enabled when the Certification Risk Factors dialog is active. Its mnemonic is "G".

9.25.1.8 OK Button

The OK button is enabled when the Certification Risk Factors dialog is active. (See the Edits and Saving the Data in the Processing section below) Characteristics for the OK button are defined in the Consistencies chapter.

9.25.1.9 Cancel Button

The Cancel button is enabled when the Certification Risk Factors dialog is active. (See Cancel in the Processing section below). Characteristics for the Cancel button are defined in the Consistencies chapter.

9.25.2 Processes

This section describes the processes (navigation) that takes place as a result of the actions taken on the Certification Risk Factors dialog.

9.25.2.1 Initializing the Interface

Upon initial display of the dialog, the following occurs:

- The title bar text is set to "Certification Risk Factors".
- An entry is added to the Available Risk Factors grid for each CPA-determined risk factor available for the WIC Category of the participant that has not been assigned to the current certification attempt. An entry is also added to the grid for each risk factor that can be assigned by either the CPA or the system but has not been assigned to the current certification attempt.
- An entry is added to the Selected Risk Factors grid for each risk factor (system-determined and CPA-determined) assigned to the current certification attempt.

- The High Risk check is marked and disabled when a risk factor in the Selected Risk Factors display grid indicates high risk. The check box is enabled and unchecked when there are no risk factors in the Selected Risk Factors display grid that indicate high risk.

9.25.2.2 Search

When the Search button is selected, the Risk Factor Search dialog defined in this document is invoked.

9.25.2.3 Select Risk Factor

When the Select button is selected, the permissions of the logged-on user are checked. If the user does not have the appropriate permissions (Risk Factor.Add or .FullControl) to add risk factors, a standard error dialog is invoked with the text, "You do not have the necessary permissions to Update Risk Factors /High Risk. Please see the supervisor."

The system removes the selected risk factor from the Available Grid and adds it the Selected Grid.

9.25.2.4 Remove Risk Factor

When the Remove button is selected, the permissions of the logged-on user are checked. If the user does not have appropriate permissions (Risk Factor.FullControl) to remove risk factors, a standard error dialog is invoked with the text, "You do not have the rights to do the operation."

If the user has permissions, the system removes the selected risk factor from the Selected Risk Factor grid and adds it back to the Available Risk Factor grid.

9.25.2.5 Saving the Data

When the OK button is selected:

The system saves the values to the database defined in the Data Map below.

The system determines if a certification record already exists for the participant with a start date that is equal to the current system date.

If a certification record does not exist with a start date equal to the current system date, the system creates a new certification record for the participant with the new list of risk factors. The new certification has the same end date as the current certification, and the current system date is used as both the start and effective dates. The system updates the current certification record so its end date is the current system date (certifications cannot overlap dates). The system also updates the participant's information with the start date of the new certification record. If the participant should be categorized as High Risk due to the new risk factors then the system updates the participant's information to indicate this. If the priority of the participant should be increased due to the new risk factors then the system uses the higher priority on the new certification record.

If the record exists then the system replaces its list of risk factors with the new list. If the participant should be categorized as High Risk due to the new risk factors then the system updates the participant's information to indicate this. If the priority of the participant should be increased then the system updates the priority on the existing certification record.

The system dismisses the Certification Risk Factor dialog and returns the user to the Certification Guided Script window.

9.25.2.6 Display Risk Factors Details Guide

When the Risk Factors Detail Guide button is selected, the on-line help facility is invoked to display the Risk Factors Details Guide.

9.25.2.7 Data Map

Control Label	Table	Attribute	Business Rule
Selected List	RiskFactor	RiskFactorID	
	RiskFactor	CreateUser	
	RiskFactor	CreateDate	
	RiskFactor	CreateTime	

A risk factor is added to the Risk Factor table for each one selected. If a high-risk risk factor is selected or the user to indicate that the participant is considered to be high risk then the Member table has its HighRisk attribute updated.

9.26 Risk Factor Search

The Risk Factor Search dialog allows the user to search for a risk factor in the Available Risk Factors display grid on the Certification Risk Factors dialog. It is invoked when the user selects the Search button on the Certification Risk Factors dialog.

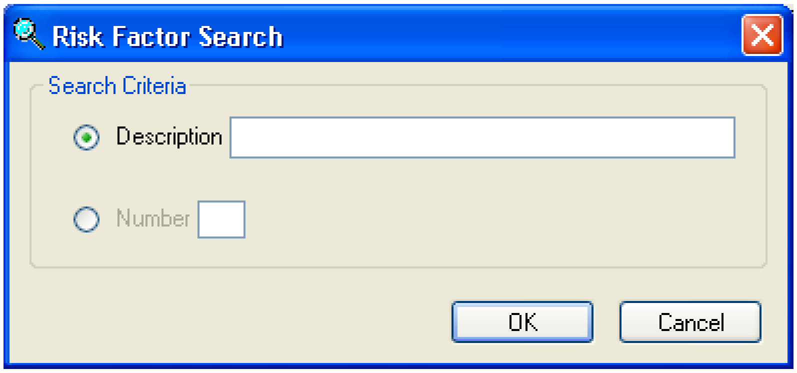


Figure 30 – Risk Factor Search Dialog

9.26.1 Controls

This section describes the behavior of the controls on the Risk Factor Search dialog.

9.26.1.1 Description Radio Button and Text Box

The Description text box is enabled when the Description radio button is selected. It is disabled when the Number radio button is selected. It accepts the entry of alphabetic and numeric characters. It allows a maximum length of sixty (60) characters for the value.

9.26.1.2 Number Radio Button and Masked Edit Box

The Number masked edit box is enabled when the Number radio button is selected. It is disabled when the Description radio button is selected. It allows the entry of numeric characters. The mask for the box is "###". If less than the maximum number of digits is entered into the masked edit box, it is padded with preceding zeros.

9.26.1.3 OK Button

The OK button is enabled when the Risk Factor Search dialog is active. Characteristics for the OK button are defined in the Consistencies chapter.

9.26.1.4 Cancel Button

The Cancel button is enabled when the Risk Factor Search dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

9.26.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Risk Factor Search dialog.

9.26.2.1 Initializing the Interface

Upon initial display of the dialog, the following occurs:

- The title bar text is set to "Risk Factor Search".
- The Description radio button is initially selected.
- The Description text box defaults to blank.

9.26.2.2 Edits

When the OK button is selected, if the Description radio button is selected and an entry has not been made in the Risk Factor Description text box, a standard confirmation dialog is invoked with the text, "An entry is required for the <control label>."

If the Number radio button is selected and an entry has not been made in the Number masked edit box, a standard confirmation dialog is invoked with the text, "An entry is required in the <control label>."

9.26.2.3 Perform Description Search

Upon successful completion of the above-listed edits and the Description radio button is selected, the system provides a *soft search* for a risk factor in the Available Risk Factors Display Grid (Available) that matches up to the number of characters entered in the Risk Factor Description text box. For example, a soft search for "Ce" would find the first risk factor that contains the letters "Ce" anywhere in its description. The *soft search* is not case sensitive.

If a matching risk factor is found, the Risk Factors/High Risk dialog is invoked with the Available Risk Factors Display Grid (Available) positioned to that risk factor.

If a matching risk factor is not found a standard confirmation dialog is invoked with the text, "No risk factors match the entered criteria." Upon dismissing the warning message the user is returned to the Risk Factor Search dialog.

9.26.2.4 Perform Number Search

Upon successful completion of the above-listed edits, if the Number radio button is selected, the system searches for a risk factor in the Available Risk Factors Display Grid (Available) that matches the number entered in the Number masked edit box.

If a matching risk factor is found, the Risk Factors/High Risk dialog is invoked with the Available Risk Factors Display Grid (Available) positioned to that risk factor.

If a matching risk factor is not found a standard confirmation dialog is invoked with the text, "No risk factors match the entered criteria." Upon dismissing the warning message the user is returned to the Risk Factor Search dialog.

9.26.2.5 Cancel

When the Cancel button is selected, the system dismisses the Risk Factor Search dialog and return to the calling window.

9.27 CPA Review

The CPA Review dialog notifies the user that the participant should be seen by a CPA and allows the user to view the reasons why a CPA Review alert exists for the participant. The dialog is automatically invoked by the system in response to the following user actions when a CPA Review alert exists for the participant:

- Opening a Participant Folder.
- Marking a participant as On-site defined in Clinic, Chapter 06 – Search-Selection.

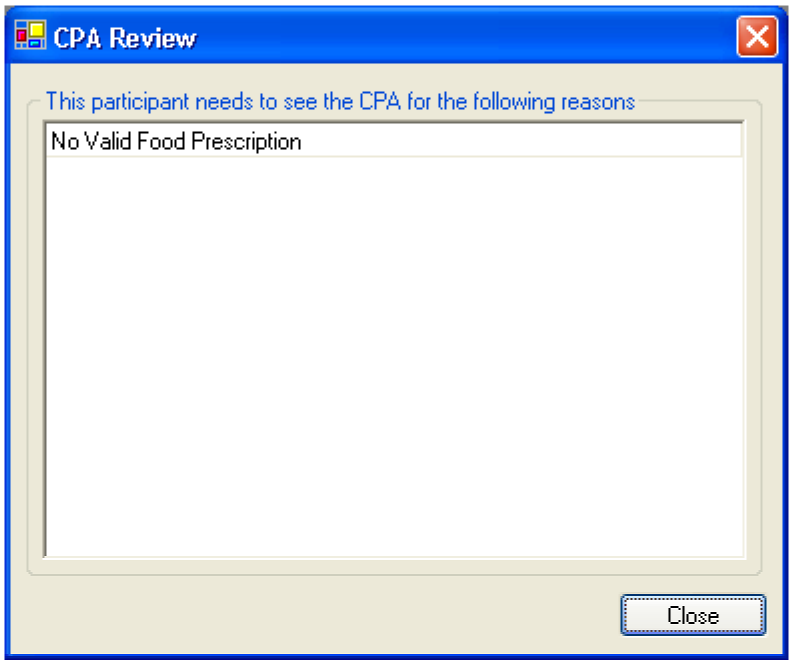


Figure 31 – CPA Review

9.27.1 Controls

The CPA Review dialog is defined in Common Interface Panels, Chapter F – CPA Review.

9.27.2 Processes

No additional processes are defined for this dialog.

9.28 VOC Certification

The VOC Certification dialog allows the user to immediately certify a participant based on a valid VOC document from another State. It is invoked when the user selects the VOC Certification menu item from the Participant Folder menu defined in this document.

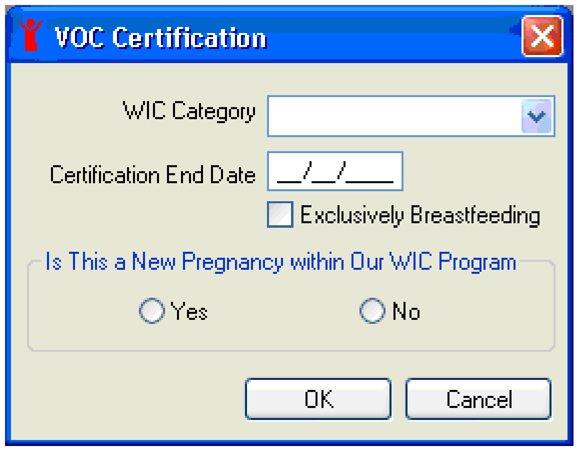


Figure 32 – VOC Certification Dialog

9.28.1 Controls

This section describes the behavior of the controls on the VOC Certification dialog.

9.28.1.1 WIC Category Drop-down List

The control allows the user to select the WIC Category of the applicant. The drop-down list is enabled when the VOC Certification dialog is active. The drop-down list includes a list of valid WIC Categories from the reference dictionary table of the lookup database. It is initially blank.

If the value selected in the drop-down list is Breastfeeding, the Exclusively Breastfeeding check box is enabled; otherwise, the Exclusively Breastfeeding check box is disabled.

9.28.1.2 Certification End Date Masked Edit Box

The control allows the user to enter the certification ending date for the participant from their VOC document. The masked edit box is enabled when the VOC Certification dialog is active. It allows the entry of numeric characters. The mask for the box is "##/##/####" to accept a date with a four-digit year. The masked edit box is initially blank.

9.28.1.3 Exclusively Breastfeeding Check Box

The control allows the user to indicate that a breastfeeding woman is Exclusively Breastfeeding her infant. The check box is enabled when the VOC Certification dialog is active and the value of the WIC Category drop-down list is Breastfeeding. It has an initial value of cleared.

9.28.1.4 Is This a New Pregnancy within Our WIC Program Radio Button Group

This group of controls allows the user to select whether this is a new pregnancy or an existing pregnancy. The radio button group is enabled when the VOC Certification dialog is active and the value of the WIC Category drop-down list is Pregnant, Breastfeeding, or Non-breastfeeding. It includes the following radio buttons:

- Yes
- No

Neither radio button is initially selected.

9.28.1.5 OK Button

The OK button is enabled when the VOC Certification dialog is active. (See *Saving the Data* in the Processing section below). Characteristics for the OK button are defined in the Consistencies chapter.

9.28.1.6 Cancel Button

The Cancel button is enabled when the VOC Certification dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

9.28.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the VOC Certification dialog.

9.28.2.1 Initializing the Interface

Upon initial presentation of the dialog, the following occurs:

- The title bar text is set to "VOC Certification".
- The following controls are initially blank:
    - WIC Category drop-down list.
    - Certification End Date masked edit box.
    - Exclusively Breastfeeding check box
    - Is This a New Pregnancy within Our WIC Program radio button group.

- The following controls are initially disabled:
    - Exclusively Breastfeeding check box.
    - Is This a New Pregnancy within Our WIC Program radio button group.

9.28.2.2 Edit for Required Entry in Controls

When OK button is selected, a check is performed to determine whether values have been entered in the following controls:

- WIC Category drop-down list
- Certification End Date masked edit box

If an entry is not made in an above-listed control, a standard error dialog is invoked with the text, "An entry is required for the {control label}".

If an invalid date is entered, a standard error dialog is invoked with the text, "Invalid date entered."

Upon successful completion of the above-listed edits, a check is performed to determine whether values entered into the controls are considered legitimate as follows:

The specified WIC Category must be applicable to the gender of the participant, according to the following table:

Gender	Acceptable WIC Category
Male	Infant, Child
Female	Infant, Child, Pregnant, Breastfeeding, Non-breastfeeding

If the WIC Category does not correspond to the date of birth of the participant a standard error dialog is invoked with the text, "WIC Category is not valid for client's date of birth (##/##/####)."

Upon successful completion of the above-listed edits, the system performs the following cross-edits:

The date value entered in the Certification End Date masked edit box must fall within the acceptable range for the selected WIC Category, according to the following table:

WIC Category	Minimum Date	Maximum Date
Infant	current system date	Value defined by business rule "DAYSVOCVALID_I"
Child	current system date	Value defined by business rule "DAYSVOCVALID_C"
Pregnant	current system date	Value defined by business rule "DAYSVOCVALID_P"
Breastfeeding	current system date	Value defined by business rule "DAYSVOCVALID_B"
Non-breastfeeding	current system date	Value defined by business rule "DAYSVOCVALID_P"

The Certification End Date masked edit box must fall between the current system date and the calculated date using the value specified in the business rule for the WIC Category, inclusive. If an invalid date is entered, a standard error dialog is invoked with the text, "The certification end date is not valid. It can be no earlier than the current system date and no later than {MAX_CERT_MONTHS_B business rule value} days in the future."

If the value of the WIC Category drop-down list is Pregnant, Breastfeeding, or Non-breastfeeding then a selection is required in the Is This a New Pregnancy within Our WIC Program radio button group. If a selection is not made, a standard error dialog is invoked with the text, "Please select either the Yes or No radio button to indicate if this is a new pregnancy."

9.28.2.3 Saving the Data (Certify Participant)

Upon successful completion of the above-listed edits, the system creates a new certification with the information entered on this dialog.

If the participant was already in a valid certification, the system terminates that certification with the reason "VOC Subsequent Certification" and uses the current system date as the terminated date. The system replaces the end date of this certification with the current system date to prevent an overlap with the new VOC certification.

If the Exclusively Breastfeeding check box is un-marked and the **Yes** radio button for Is This a New Pregnancy within Our WIC Program is marked the system creates a new certification record. A new pregnancy record is created for the participant if the WIC category is pregnant. A new postpartum record is created for the participant if the WIC category is breastfeeding or non-breastfeeding.

If the Exclusively Breastfeeding check box is un-marked and the **No** radio button for Is This a New Pregnancy within Our WIC Program is marked the system links the current pregnancy record to the new certification record that is created for the participant if the WIC category is pregnant.

Or, the system creates a new postpartum record for the new certification record that is created for the participant if the previous certification was for a pregnancy and the selected WIC category is breastfeeding or non-breastfeeding. Or, the system links the current postpartum record to the new certification record that is created for the participant if the WIC category is breastfeeding or non-breastfeeding. A new postpartum record is linked to the previous pregnancy if the expected delivery date and the actual delivery date are within 6 weeks.

If the Exclusively Breastfeeding check box is marked and the **Yes** radio button for Is This a New Pregnancy within Our WIC Program is marked the system creates a new certification record. The new certification record is linked to a new postpartum record and a new "place holder" record in the postpartum infant table for the participant is created. This allows the woman to receive the Exclusively-Breastfeeding food prescription items. The new postpartum record is linked to the previous pregnancy if the previous pregnancy expected delivery date and the postpartum actual delivery date are within 6 weeks.

If the Exclusively Breastfeeding check box is marked and the **No** radio button for Is This a New Pregnancy within Our WIC Program is marked the system does the following:

- The system creates a new certification record for the participant.
- The system verifies that the actual delivery date on the most current postpartum record is less than one year from the current system date.
    - If the actual delivery date is **less** than one year the system links the most current postpartum record to the new certification. The system verifies that a postpartum infant record is linked to the postpartum record. If there is not a postpartum infant record linked to the postpartum, the system creates one and link it to the postpartum.

  - If the actual delivery date is **greater** than or equal to one year from the current system date or the actual delivery date is blank the system creates a new postpartum and links it to the new certification record. A new postpartum infant record is created and linked to the new postpartum record for the participant.

This allows the woman to receive the Exclusively-Breastfeeding food prescription items.

9.28.2.4 Data Map

The values are saved as follows:

- CertContact table (after creating a new record):
- StateWicID – ID of the participant
- CertStartDate – the current system date
- CertEffectiveDate – the current system date
- CertEndDate – date entered by the user on the dialog
- PregnancyID – ID from the related Pregnancy table record (if the participant is certified as a pregnant woman)
- PostpartumID – ID from the related Postpartum table record (if the participant is certified as a postpartum woman)
- VOCDocument – set to "Y" for Yes
- CertAgencyID – the ID of the user's agency
- CertServiceSiteID – the ID of the user's clinic
- CertAssignedPriority – the highest priority allowed for the WIC category picked by the user (query the PriorityPerWICStatus table using the WIC category and use the highest value in the Priority field)
- CertWICStatus – WIC category picked by the user on the dialog

9.28.2.4.1 RiskFactor table

- CertificationID – ID from the related CertContact table record
- RiskFactorID – set to "502" (the ID of the "Transfer of Certification" risk factor from the RiskFactorReference table)
- WICStatus – WIC category picked by the user on the dialog
- AgeCategoryID – the risk factor age category for the participant's current age
- SystemAssigned- set to "Y" for Yes
- HighRisk – set to "N" for No

9.28.2.4.2 Member table

- Terminated – set to "N" for No
- TerminatedDate – set to NULL
- WICStatus – set to the WIC category picked by the user on the dialog
- VOCDocument – set to "Y" for Yes
- ValidCertification – set to "Y" for Yes
- CertificationID – ID from the related CertContact table record
- PendingCertificationID – set to NULL
- CertStartDate – the current system date
- CertificationDueDate – date entered by the user for the Certification End Date on the dialog

9.28.2.4.3 Pregnancy table (if a new pregnancy record was created)

- StateWicID – ID of the participant
- PregRcdDate – the current system date
- InfoDate – the current system date

9.28.2.4.4 Postpartum table (if a new postpartum record was created)

- StateWicID – ID of the participant
- PregnancyID – ID from the Pregnancy table record if linked to the Pregnancy resulting in this postpartum certification
- CDCReportedDt – Pregnancy.CDCReportedDt if linked to a PregnancyID

9.28.2.4.5 PostpartumInfant table (if a new record was created)

- PostpartumID – ID from the Postpartum table record
- InfantNumber – set to 1
- EverBreastfed – set to "Y" for Yes
- CurrentlyBreastfed – set to "Y" for Yes
- AmountBreastfeeding – set to "1" (the key value of the "Exclusively Breastfeeding" record in the BFAMOUNT category of the ReferenceDictionary table)

9.29 View Notes

The View Notes dialog allows the user to view previously created notes for the selected household member. Additionally, the user may create a SOAP note or general note for the household member. The View Notes dialog is invoked when the user selects the Manage Notes list item from the Participant Activities menu.

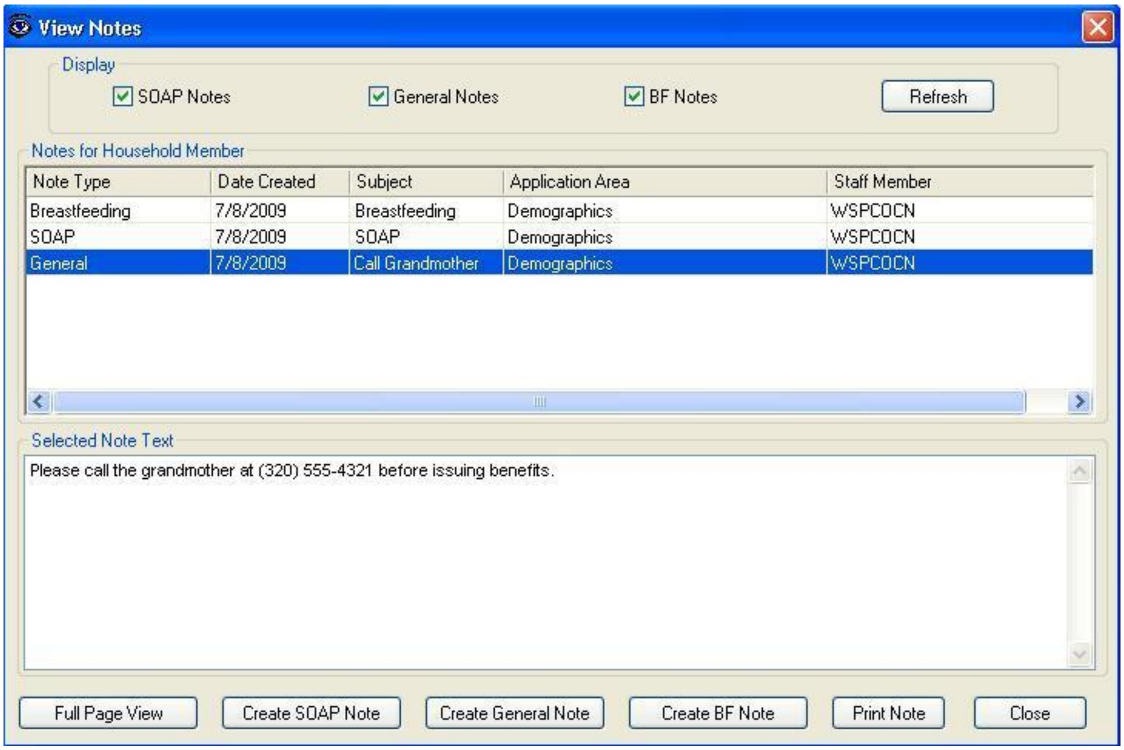


Figure 33 – View Notes Dialog

9.29.1 Controls

This section describes the behavior of the controls on the View Notes dialog.

9.29.1.1 Notes View Group (Display)

The control allows the user to indicate which type of notes to view. The check box group is enabled when the View Notes dialog is active. It includes the following check boxes:

- SOAP Notes
- General Notes
- BF Notes

The permissions of the logged-on user are checked. If the user has the appropriate permissions (Soap Notes.View or Add; General Notes.View or Add; Breastfeeding Notes.View or Add), the check box group is enabled and the check boxes for which the user has permission are initially selected.

When a check box is selected, the contents of the Notes display grid are refreshed.

9.29.1.2 Notes for Household Member Display Grid

The control allows the user to view the notes that have been previously defined for the household member. The grid is enabled when the View Notes dialog is active. It includes the following columns:

- Note Type
- Date Created
- Subject (if the IncludeNoteSubject business rule is set to "Y")
- Application Area
- Staff Member

The grid is filled with an entry for each note recorded on the local database for the selected household member according to the selection of the Notes View check box group as follows:

- If only the SOAP Notes check box is marked, entries for SOAP notes displays in the grid.
- If only the General Notes check box is marked, entries for general notes displays in the grid.
- If only the BF Notes check box is marked, entries for Breastfeeding notes displays in the grid.
- If only the SOAP Notes and General Notes check boxes are marked, entries for SOAP notes and General Notes displays in the grid.
- If only the SOAP Notes and BF Notes check boxes are marked, entries for SOAP notes and BF Notes displays in the grid.
- If only the General Notes and BF Notes check boxes are marked, entries for General Notes and BF Notes displays in the grid.
- If the SOAP Notes, General Notes and BF Notes check boxes are marked, all entries for SOAP notes, General Notes and BF Notes displays in the grid.

The permissions of the logged-on user are checked. If the user does not have the appropriate permissions (ProtectedNotes.View, .Add, or .FullControl) to view the selected protected notes, only non-protected notes and notes that the logged-on user created are included in the grid. If the user has the appropriate permissions for the type of note selected (SOAP, General and/or Breastfeeding Notes), the grid includes all notes for the selected household member.

The entries are sorted according to the value of the Date Created column in the order indicated by the NoteSortOrder business rule. If the NoteSortOrder business rule = "C", the notes are sorted chronologically by date. If the NoteSortOrder business rule = "R", the notes are sorted in reverse chronological order by date. The values in the control are read-only.

9.29.1.3 Selected Note View Text Box

The control allows the user to view the actual text of the note. The text box is enabled when the View Notes dialog is active. It is filled with the actual text of the note selected in the Notes display grid. The contents of the control are read-only. When the text exceeds the bounds of the text box, a vertical scroll bar displays.

9.29.1.4 Full Page View Button

The control allows the user to view the selected note using the maximum available space on the screen to minimize the need to scroll when viewing the text. The Full Page View button is enabled when the View Notes dialog is active. Its mnemonic is "F".

9.29.1.5 Create SOAP Note Button

The control allows the user to create a new SOAP note for the selected household member. The Create SOAP Note button is enabled when the View Notes dialog is active. Its mnemonic is "S".

When the button is selected, the permissions of the logged-on user are checked. If the user does not have the appropriate permissions (SOAP Notes.Add) to create SOAP notes for the household member, a standard error dialog is invoked with the text, "You do not have the necessary permissions to create a SOAP note. Please see the supervisor."

9.29.1.6 Create General Note Button

The control allows the user to create a new general note for the selected household member. The Create General Note button is enabled when the View Notes dialog is active. Its mnemonic is "G".

When the button is selected, the permissions of the logged-on user are checked. If the user does not have the appropriate permissions (General Notes.Add) to create general notes for the household member, a standard error dialog is invoked with the text, "You do not have the necessary permissions to create general notes. Please see the supervisor."

9.29.1.7 Create BF Note Button

The control allows the user to create a new breastfeeding note for the selected household member. The Create BF Note button is enabled when the View Notes dialog is active. Its mnemonic is "B".

When the button is selected, the permissions of the logged-on user are checked. If the user does not have the appropriate permissions (Breastfeeding Notes.Add) to create breastfeeding notes for the household member, a standard error dialog is invoked with the text, "You do not have the necessary permissions to create Breastfeeding notes. Please see the supervisor."

9.29.1.8 Print Button

The control allows the user to print the selected note. The Print button is enabled when the View Notes dialog is active. Its mnemonic is "P".

9.29.1.9 Close Button

The control allows the user to exit the View Notes dialog and return to the calling window. The Close button is enabled when the View Notes dialog is active. Characteristics for the Close button are defined in the Consistencies chapter.

9.29.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the View Notes dialog.

9.29.2.1 Display Full Page View of Note

When the Full Page View button is selected, the Selected Note – Full Page View dialog defined in this document is invoked.

9.29.2.2 Create SOAP Note

When the Create SOAP Note button is selected, the Create SOAP Note dialog defined in this document is invoked.

9.29.2.3 Create General Note

When the Create General Note button is selected, the Create General Note dialog defined in this document is invoked.

9.29.2.4 Create Breastfeeding Note

When the Create BF Note button is selected, the Create Breastfeeding Note dialog defined in this document is invoked.

9.29.2.5 Print Note

When the Print button is selected, the system prints the note to the selected default report printer.

9.30 Full Page View of Note

The Selected Note – Full Page View dialog allows the user to view the selected note on the Note display grid. The Selected Note – Full Page View dialog is invoked when the user selects the Full Page View button on the View Notes dialog.

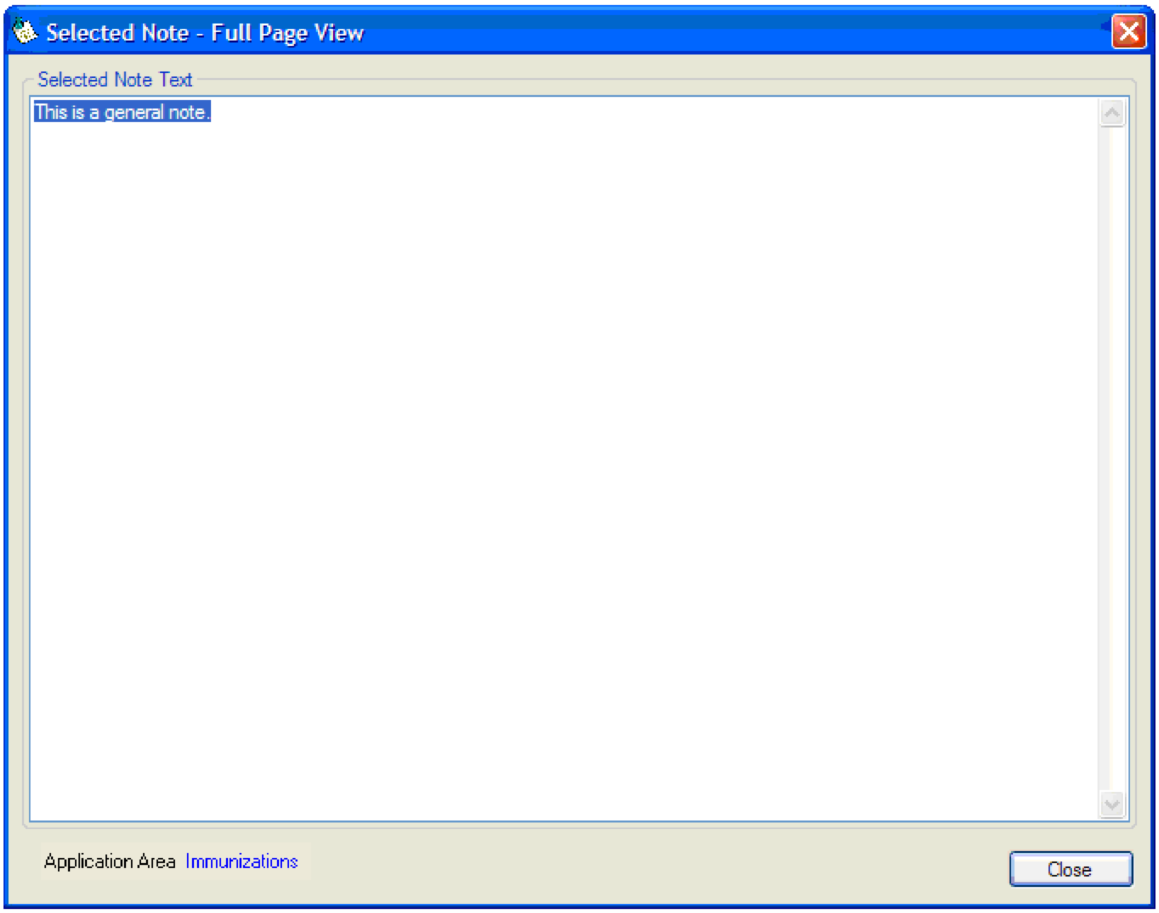


Figure 34 – Selected Note – Full Page View Dialog

9.30.1 Controls

This section describes the behavior of the controls on Selected Note – Full Page View dialog.

9.30.1.1 Selected Note Text Box

The control allows the user to view the actual text of the note. The text box is enabled when the Selected Note – Full Page View dialog is active. It is filled with the actual text of the note selected in the Notes display grid of the View Notes dialog. The contents of the control are read-only. When the text exceeds the bounds of the text box, vertical scroll bar displays.

9.30.1.2 Application Area Text Label and Value Label

The control allows the user to view the area of the application the user was in when they created the note. It displays in the inverse color of the form. Note that this control does not receive focus and is not included in the tab order of this dialog.

9.30.1.3 Close Button

The control allows the user to exit the Selected Note – Full Page View dialog and return to the View Notes dialog. The Close button is enabled when the Selected Note – Full Page View dialog is active. Characteristics for the Close button are defined in the Consistencies chapter.

9.30.2 Processes

No additional processes are defined for this dialog.

9.31 Create SOAP Note

The Create SOAP Note dialog allows the user to create a SOAP note for the selected household member. The Create SOAP Note dialog is invoked when the user selects the Create SOAP Note button on the View Notes dialog.

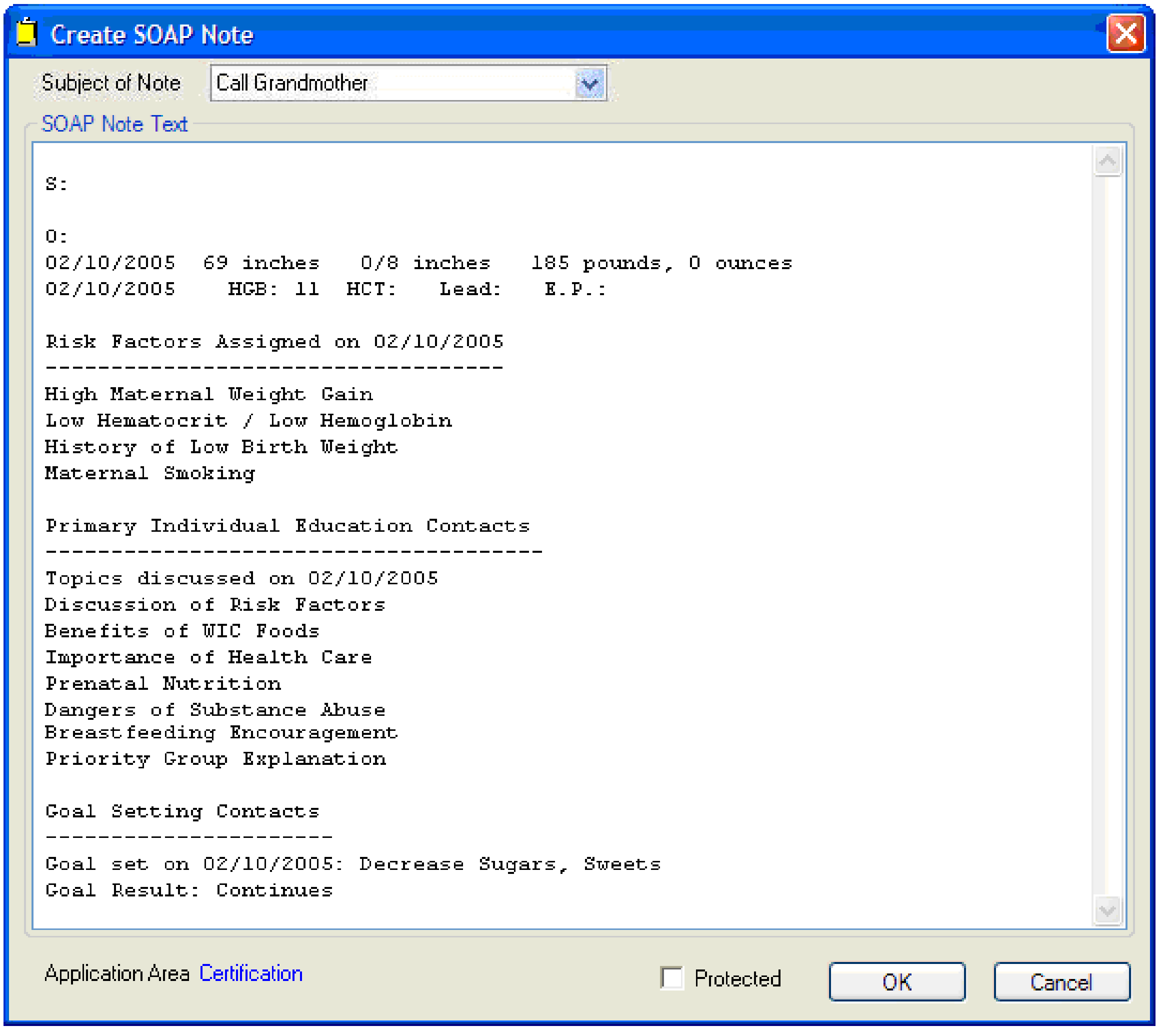


Figure 35 – Create SOAP Note Dialog

9.31.1 Controls

This section describes the behavior of the controls on the Create SOAP Note dialog.

9.31.1.1 Subject of Note Drop-down List

The drop-down list is visible and enabled when the dialog is active and the IncludeNoteSubject business rule is set to "Y". It includes a list of note subjects as defined for the Reference Dictionary dialog defined in Application Administration Chapter 9 – Reference Utility. Nothing is selected as the default.

9.31.1.2 SOAP Note Text Box

The control allows the user to enter the text of the SOAP note for the household member. The text box is enabled when the Create SOAP Note dialog is active. When the text exceeds the bounds of the text box, vertical scroll bar displays.

The text box is initially populated with the SOAP note template that includes the Subjective ("S:"), Objective ("O:"), Assessment ("A:") and Plan ("P:") sections. When the NoSubjectiveInSOAP business rule is set to True, the Subjective section is not included in the SOAP note template. When the NoSubjectiveInSOAP business rule is set to False, the Subjective section is included in the SOAP note template. The Objective section is automatically populated with the height, weight, blood work, referrals, and risk factor information from the current certification. The height information includes the growth chart percentiles for the height and weight measurements.

When the AddEducationToSOAP business rule is set to True, the Objective section is automatically populated with the Goal Setting and Individual Primary education contacts that have been recorded during the current certification.

When the AddAnalysisToSOAP business rule is set to True, the Assessment section is automatically populated with the default assessment information that is associated with each risk factor that was assigned to the current certification.

When the AddPlanToSOAP business rule is set to True, the Plan section is automatically populated with the default plan information that is associated with each risk factor that was assigned to the current certification as well as the referral information for the participant

The control has focus upon entry to the dialog. The cursor is placed on the second line following the "S". When the *ExcludeSubjective* business rule is set to True, the cursor is placed on the second line following the "A".

The SOAP Note template is populated as follows:

S: (Subjective) – defaults blank

O: (Objective) The Objective section is populated with all of the following:

Each height/weight measurement is formatted as follows:

{date} {inches} {eighths}/8 inches {pounds} pounds, {ounces} ounces

{date} = AnthropContact.MeasurementDate

{inches} = AnthropContact.LengthInches

{eighths} = AnthropContact.LengthEighths

{pounds} = AnthropContact.WeightPounds

{ounces} = AnthropContact.WeightOunces

Each blood work measurement is formatted as follows:

{date} HGB: {hemoglobin} HCT: {hematocrit} Lead: {lead} E.P.: {EP}

{date} = BloodWork.ResultDate

{hemoglobin} = BloodWork.Hemoglobin

{hematocrit} = BloodWork.Hematocrit

{lead} = BloodWork.Lead

{EP} = BloodWork.EP

Each risk factor is formatted as follows:

{ID} {description}

{ID} = RiskFactor.RiskFactorID

{description} = RiskFactorReference.Description for the RiskFactor.RiskFactorID

If the AddEducationToSOAP business rule = "Y",

Each primary individual education contact for the most recent contact for the current certification displays:

Topics discussed on {date}

{topic}

NOTE: The {topic} line is repeated for each DiscussionTopic record that is related to the EducationContact record.

{date} = EducationContact.ContactDate

{topic} = IndividualEducationTopic.Description for the DiscussionTopic.Topic

If the AddEducationToSOAP business rule = "Y"

Each goal setting contact the most recent contact for the current certification displays:

Goal set on {date}: {goal}

Goal Result: {result}

{date} = EducationContact.ContactDate

{goal} = ReferenceDictionary.Description for EducationContact.Goal {result} = ReferenceDictionary.Description for EducationContact.GoalResult

A: (Assessment) – If the AddAnalysisToSOAP business rule = "Y", the Assessment section is populated with the RiskFactorReference.DefaultAssessment for all of the RiskFactor records associated with the current CertContact record for the participant. Otherwise it is blank.

P: (Plan) If the AddPlanToSOAP business rule = "Y", -the Plan section is populated with the RiskFactorReference.DefaultPlan for all of the RiskFactor records associated with the current CertContact record for the participant. Otherwise it defaults to blank.

9.31.1.3 Application Area Text Label and Value Label

The control allows the user to view the area of the application where they were working right before creating this note. It displays in the inverse color of the form. Note that this control does not receive focus and is not included in the tab order of this dialog.

9.31.1.4 Protected Check Box

The control allows the user to indicate that the note contains sensitive information and it is only displayed to the user who created the note and the staff members who have the ProtectedNote.View permission for SOAP Notes. The check box is enabled when the Create SOAP Note dialog is active. It has an initial value of cleared.

9.31.1.5 OK Button

The control allows the user to save the SOAP note and exit the Create SOAP Note dialog. It is enabled when the Create SOAP Note dialog is active. Characteristics for the OK button are defined in the Consistencies chapter.

9.31.1.6 Cancel Button

The control allows the user to discard the changes made to the SOAP note and exit the Create SOAP Note dialog. It is enabled when the Create SOAP Note dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

9.31.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Create SOAP Note dialog.

9.31.2.1 Initializing the Interface

Upon initial display, the following occurs:

- The title bar text is set to "Create SOAP Note".
- If the IncludeNoteSubject business rule is set to "Y", the Subject of Note drop-down list is visible and enabled. If the IncludeNoteSubject business rule is set to "N", the Subject of Note drop-down list is not visible.
- The SOAP Note text box is initially populated as defined under the SOAP Note text box.
- The Application Area displays the area of the application where the user was working right before they created the note.
- The Protected check box is initially blank.

9.31.2.2 Edits

When the OK button is selected, if an entry is not made in the following:

- Subject of Note drop-down list
- SOAP Note text box

A standard error dialog is invoked with the text, "An entry is required for the {control label}".

A change is required in addition to the text contained in the SOAP Note template. The text in the template alone does not satisfy the requirement that an entry be made in the text box.

9.31.2.3 Save SOAP Note

When the OK button is selected, the system writes the SOAP note information on the dialog to the database (see *Data Map* section below). The system closes the Create SOAP Note dialog and proceeds as follows, the user is returned to the View Notes dialog.

9.31.2.4 Data Map

Control Label	Table	Attribute	Business Rule
Participant	HealthNote	StateWICID	
Subject of Note	HealthNote	NoteSubject	IncludeNoteSubject
SOAP Note Text	HealthNote	NoteText	
Application Area	HealthNote	ApplicationArea	
Protected	HealthNote	Protected	

9.32 Create General Note

The Create General Note dialog allows the user to create a general note for the selected household member. The Create General Note dialog is invoked when the user selects the Create General Note button on the View Notes dialog.

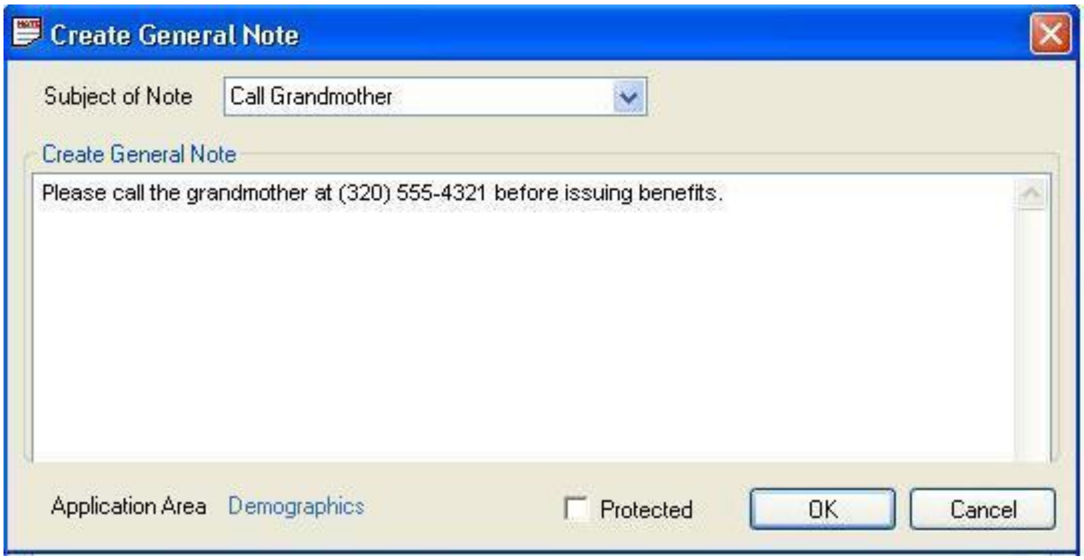


Figure 36 – Create General Note Dialog

9.32.1 Controls

This section describes the behavior of the controls on the Create General Note dialog.

9.32.1.1 Subject of Note Drop-down List

The drop-down list is visible and enabled when the dialog is active and the IncludeNoteSubject business rule is set to "Y". It includes a list of note subjects as defined for the Reference Dictionary dialog defined in Application Administration Chapter 9 – Reference Utility. Nothing is selected as the default.

9.32.1.2 General Note Text Box

The control allows the user to enter the text of the general note for the household member. The text box is enabled when the Create General Note dialog is active. When the text exceeds the bounds of the text box, a vertical scroll bar displays. It is initially blank. The control has focus upon entry to the dialog.

9.32.1.3 Application Area Text Label and Value Label

The control allows the user to view the area of the application where they were working right before creating this note. It displays in the inverse color of the form. Note that this control does not receive focus and is not included in the tab order of this dialog.

9.32.1.4 Protected Check Box

The control allows the user to indicate that the note contains sensitive information and it should only be displayed to the user who created the noted and staff members who have the proper security. The check box is enabled when the Create General Note dialog is active. It has an initial value of cleared.

9.32.1.5 OK Button

The control allows the user to save the general note and exit the Create General Note dialog. The OK button is enabled when the Create General Note dialog is active. Characteristics for the OK button are defined in the Consistencies chapter.

9.32.1.6 Cancel Button

The control allows the user to discard changes made to the general note and exit the Create General Note dialog. The Cancel button is enabled when the Create General Note dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

9.32.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Create General Note dialog.

9.32.2.1 Initializing the Interface

Upon initial display, the following occurs:

- The title bar text is set to "Create General Note".
- If the IncludeNoteSubject business rule is set to "Y", the Subject of Note drop-down list is visible and enabled. If the IncludeNoteSubject business rule is set to "N", the Subject of Note drop-down list is not visible.
- The General Note text box is initially blank.
- The Application Area displays the area of the application where the user was working right before they created the note.
- The Protected check box is initially blank.

9.32.2.2 Edits

When the OK button is selected, if an entry is not made in the following:

- Subject of Note drop-down list
- General Note text box

A standard error dialog is invoked with the text, "An entry is required for the {control label}".

9.32.2.3 Save General Note

When the OK button is selected, the system writes the general note information on the dialog to the database (see *Data Map* section below). The system closes the Create General Note dialog and return to the View Notes dialog.

9.32.2.4 Data Map

Control Label	Table	Attribute	Business Rule
Participant	HealthNote	StateWICID	
Subject of Note	HealthNote	NoteSubject	IncludeNoteSubject
General Note Text	HealthNote	NoteText	
Application Area	HealthNote	ApplicationArea	
Protected	HealthNote	Protected	

9.33 Create Breastfeeding Note

The Create Breastfeeding Note dialog allows the user to create a breastfeeding note for the selected household member. The Create Breastfeeding Note dialog is invoked when the user selects the Create BF Note button on the View Notes dialog.

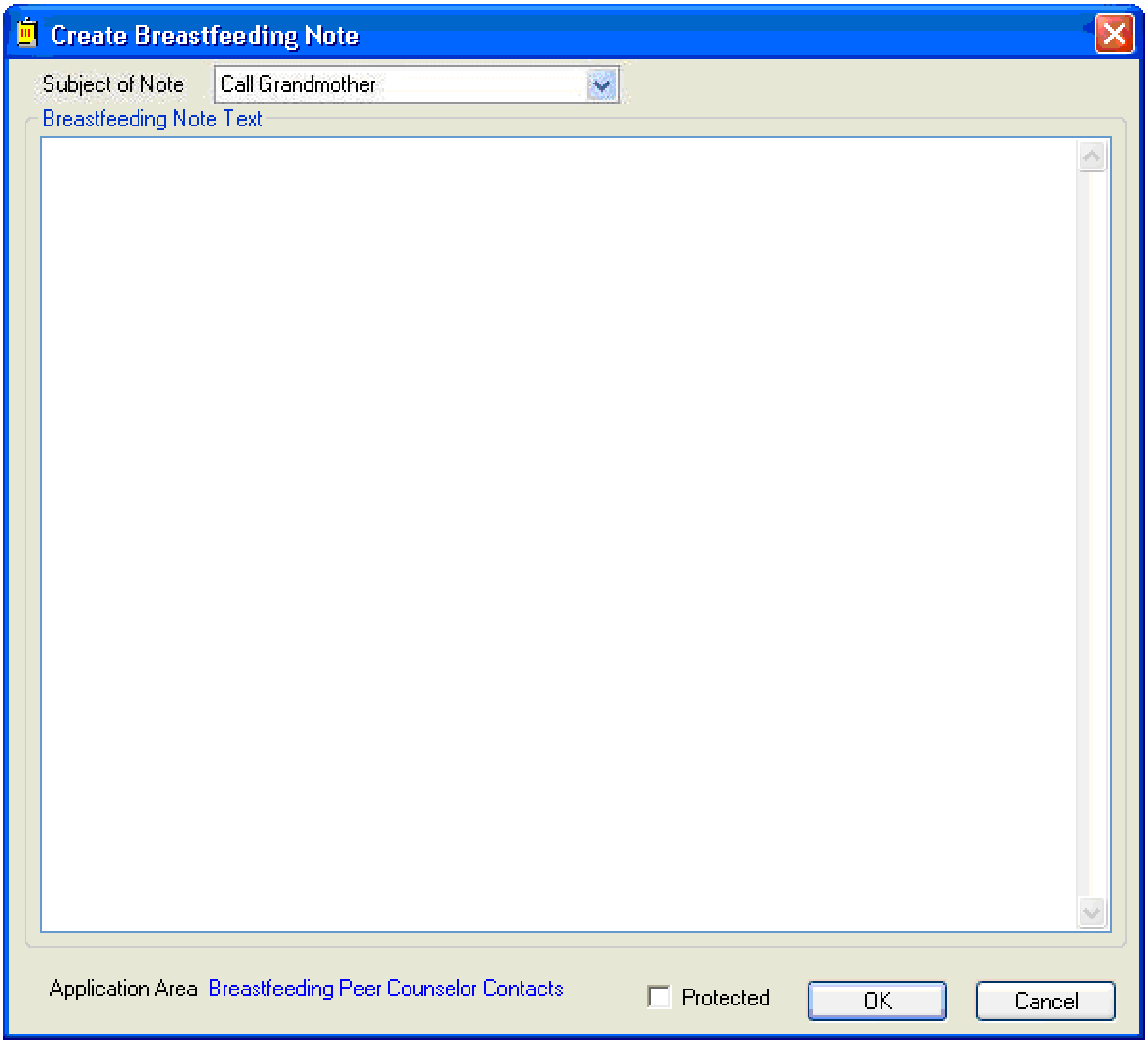


Figure 37 – Create Breastfeeding Note Dialog

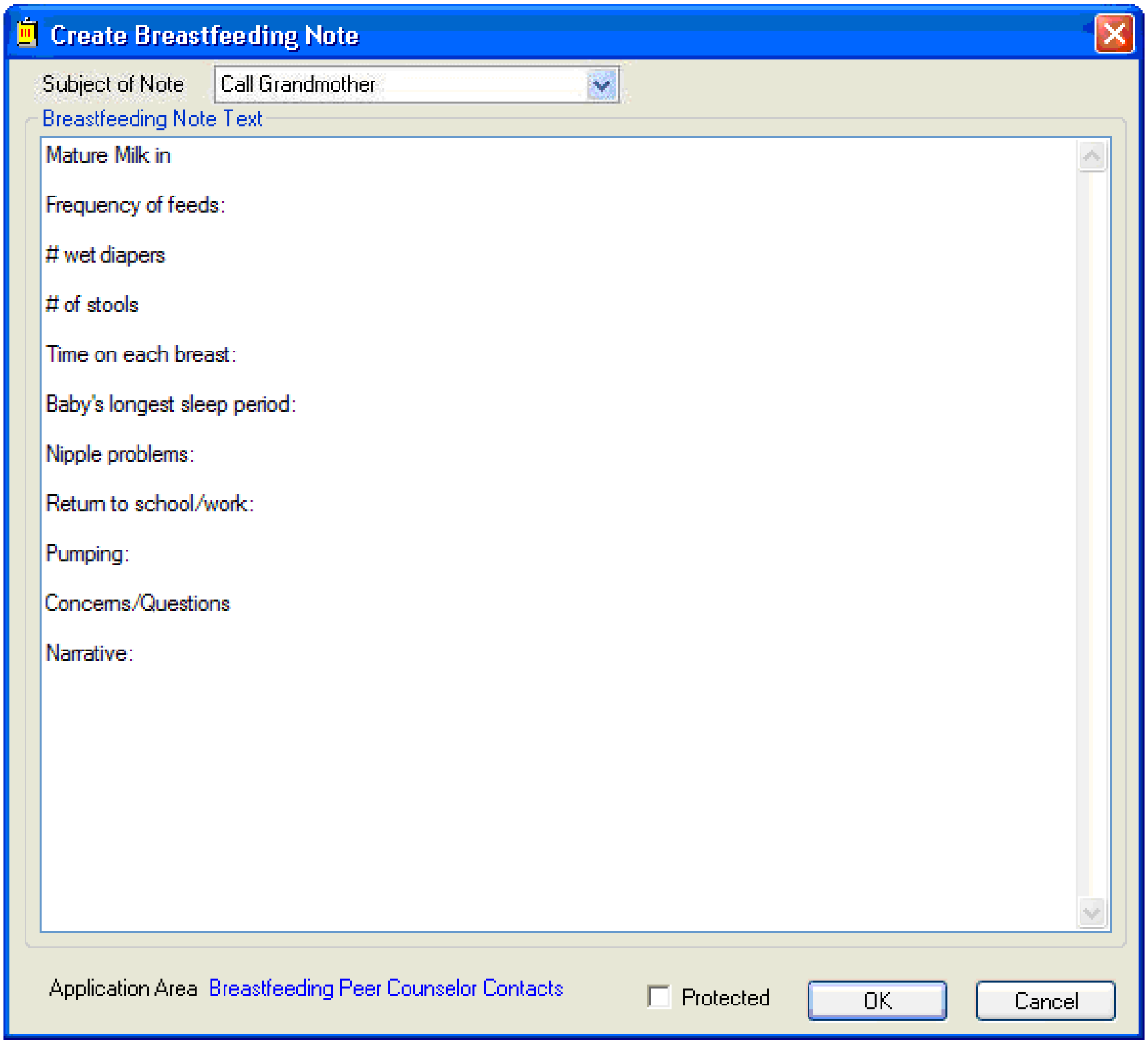


Figure 38 – Create Breastfeeding Note Dialog (with template)

9.33.1 Controls

This section describes the behavior of the controls on the Create Breastfeeding Note dialog.

9.33.1.1 Subject of Note Drop-down List

The drop-down list is visible and enabled when the dialog is active and the IncludeNoteSubject business rule is set to "Y". It includes a list of note subjects as defined for the Reference Dictionary dialog defined in Application Administration Chapter 9 – Reference Utility. Nothing is selected as the default.

9.33.1.2 Breastfeeding Note Text Box (Breastfeeding Note Text)

The control allows the user to enter the text of the breastfeeding note for the household member. The text box is enabled when the Create Breastfeeding Note dialog is active. When the text exceeds the bounds of the text box, a vertical scroll bar displays. The control has focus upon entry to the dialog.

9.33.1.3 Application Area Text Label and Value Label

The control allows the user to view the area of the application where they were working right before creating this note. It displays in the inverse color of the form. Note that this control does not receive focus and is not included in the tab order of this dialog.

9.33.1.4 Protected Check Box

The control allows the user to indicate that the note contains sensitive information and it should only be displayed to the user who created the noted and staff members who have the proper security. The check box is enabled when the Create Breastfeeding Note dialog is active. It has an initial value of cleared.

9.33.1.5 OK Button

The control allows the user to save the general note and exit the Create Breastfeeding Note dialog. The OK button is enabled when the Create Breastfeeding Note dialog is active. Characteristics for the OK button are defined in the Consistencies chapter.

9.33.1.6 Cancel Button

The control allows the user to discard changes made to the breastfeeding note and exit the Create Breastfeeding Note dialog. The Cancel button is enabled when the Create Breastfeeding Note dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

9.33.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Create Breastfeeding Note dialog.

9.33.2.1 Initializing the Interface

Upon initial display, the following occurs:

- The title bar text is set to "Create Breastfeeding Note".

- If the IncludeNoteSubject business rule is set to "Y", the Subject of Note drop-down list is visible and enabled. If the IncludeNoteSubject business rule is set to "N", the Subject of Note drop-down list is not visible.
- A standard confirmation dialog is invoked with the text, "Do you want to use the Breastfeeding Note template?" Yes and No buttons are available. If the user selects Yes, the Breastfeeding Note text box is initially populated with the Breastfeeding Note template that has been defined by the state. If the user selects No, the Breastfeeding Note text box is initially blank.
- The Application Area displays the area of the application where the user was working right before they created the note.
- The Protected check box is initially blank.

9.33.2.2 Edits

When the OK button is selected, if an entry is not made in the following:

- Subject of Note drop-down list
- Breastfeeding Note text box

A standard error dialog is invoked with the text, "An entry is required for the {control label}".

A change is required in addition to the text contained in the Breastfeeding Note template. The text in the template alone does not satisfy the requirement that an entry be made in the text box.

9.33.2.3 Save Breastfeeding Note

When the OK button is selected, the system writes the breastfeeding note information on the dialog to the database (see *Data Map* section below). The system closes the Create Breastfeeding Note dialog and return to the View Notes dialog.

9.33.2.4 Data Map

Control Label	**Table**	**Attribute**	**Business Rule**
Participant	HealthNote	StateWICID	
Subject of Note	HealthNote	NoteSubject	IncludeNoteSubject
Breastfeeding Note Text	HealthNote	NoteText	
Application Area	HealthNote	ApplicationArea	
Protected	HealthNote	Protected	

9.34 Alerts List for Household

The Alerts List for Household dialog allows the user to view the alerts defined for the selected household member and other members of the household. The user can also add, edit, or delete alerts for the household members. The Alerts List for Household dialog is invoked when the user selects the Manage Alerts menu item from the Participant Activities menu.

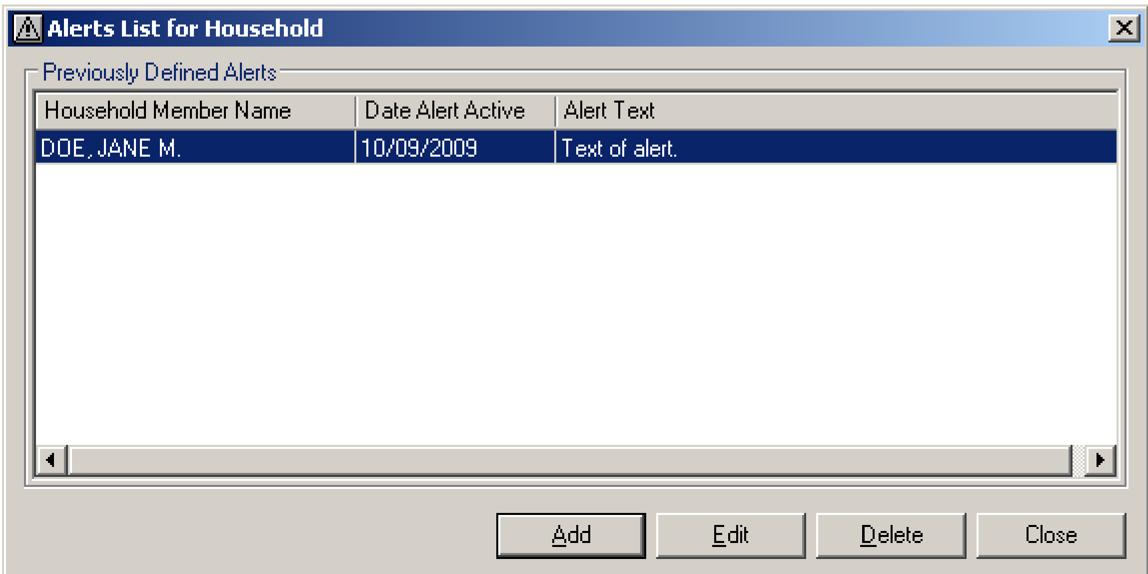


Figure 39 – Alerts List for Household Dialog

9.34.1 Controls

This section describes the behavior of the controls on the Alerts List for Household dialog.

9.34.1.1 Alerts Display Grid (Previously Defined Alerts)

The control allows the user to view the defined alerts for the selected household member and other members of the household. The grid is enabled when the Alerts List for Household dialog is active. It includes the following columns:

- Household Member Name
- Date Alert Active
- Abbreviated Text of Alert (Alert Text)

The grid is filled with entries for all defined alerts for the household member and other members of the household: {Member.LastName, Member.FirstName, and Member.MiddleInitial} {Alert.ActiveDate} {The first 35 characters of the Alert.MessageText}. The permissions of the logged-on user are checked. If the user does not have the appropriate permissions (ProtectedAlerts.View, .Add, or .FullControl) to view protected alerts, only non-protected alerts are included in the grid.

The entries are sorted in reverse chronological order according to the value of the Date Alert Active column. The values in the control are read-only.

9.34.1.2 Add Button

The control allows the user to add an alert for the selected household member. The Add button is enabled when the Alerts List for Household dialog is active. Its mnemonic is "A".

When the button is selected, the permissions of the logged-on user are checked. If the user does not have the appropriate permissions (Alerts.Add or .FullControl) to add an alert for the household member, a standard error dialog is invoked with the text, "You do not have the necessary permissions to add an alert. Please see the supervisor."

9.34.1.3 Edit Button

The control allows the user to update information about the alert selected on the Alerts display grid. The Edit button is enabled when an alert is selected on the Alerts display grid. It has mnemonic of "E".

When the button is selected, the permissions of the logged-on user are checked. If the user does not have the appropriate permissions (Alerts.FullControl) to edit an alert for the household member, a standard error dialog is invoked with the text, "You do not have the necessary permissions to edit an alert. Please see the supervisor."

9.34.1.4 Delete Button

The control allows the user to delete the alert selected on the Alerts display grid. The Delete button is enabled when an alert is selected on the Alerts display grid. Its mnemonic is "D".

When the button is selected, the permissions of the logged-on user are checked. If the user does not have the appropriate permissions (Alerts.FullControl) to delete an alert for the household member, a standard error dialog is invoked with the text, "You do not have the necessary permissions to delete an alert. Please see the supervisor."

9.34.1.5 Close Button

The control allows the user to exit the Alerts List for Household dialog. The Close button is enabled when the Alerts List for Household dialog is active. Characteristics for the Close button are defined in the Consistencies chapter.

9.34.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Alerts List for Household dialog.

9.34.2.1 Initializing the Interface

Upon initial display of the dialog, the following occurs:

- The title bar text is set to "Alerts List for Household".
- The Previously Defined Alerts grid displays all members of the household who have alerts defined. The permissions of the logged-on user are checked. If the user does not have the appropriate permissions (Protected Alerts.View, .Add, or .FullControl) to view protected alerts, only non-protected alerts are included in the grid. The Grid displays the (Member.LastName Member.FirstName Member.MiddleInitial) (Alert.ActiveDate) (the first 35 characters of the Alert.MessageText).

9.34.2.2 Add Alert

When the Add button is selected, the Update Alert dialog defined in Section 9.35 is invoked in Add mode.

9.34.2.3 Edit Alert

When the Edit button is selected, the Update Alert dialog defined in Section 9.35 is invoked in Edit mode

9.34.2.4 Delete Alert

When the Delete Alert button is selected, a standard confirmation dialog is invoked with the text, "Are you sure you want to delete this alert?" Yes and No button are available. If the user selects Yes, the system deletes the alert selected on the Alerts display grid and update the contents of the grid. If the user selects No, the user is returned to the Alerts List for Household dialog without deleting the alert.

9.35 Update Alert

The Update Alert dialog allows the user to add an alert to a household or household member, or edit the alert selected on the Alerts display grid of the Alerts List for Household dialog. The Update Alert dialog is invoked in response to the following user actions:

- Selection of the Add button on the Alerts List for Household dialog defined in this document.
- Selection of the Edit button on the Alerts List for Household dialog defined in this document.

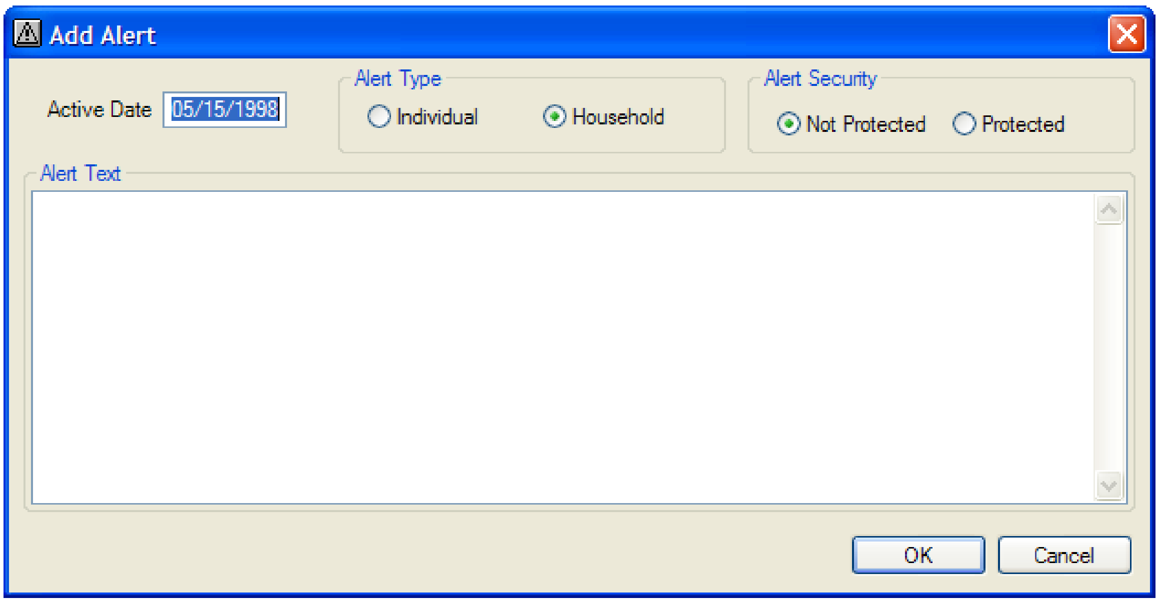


Figure 40 – Add Alert Dialog

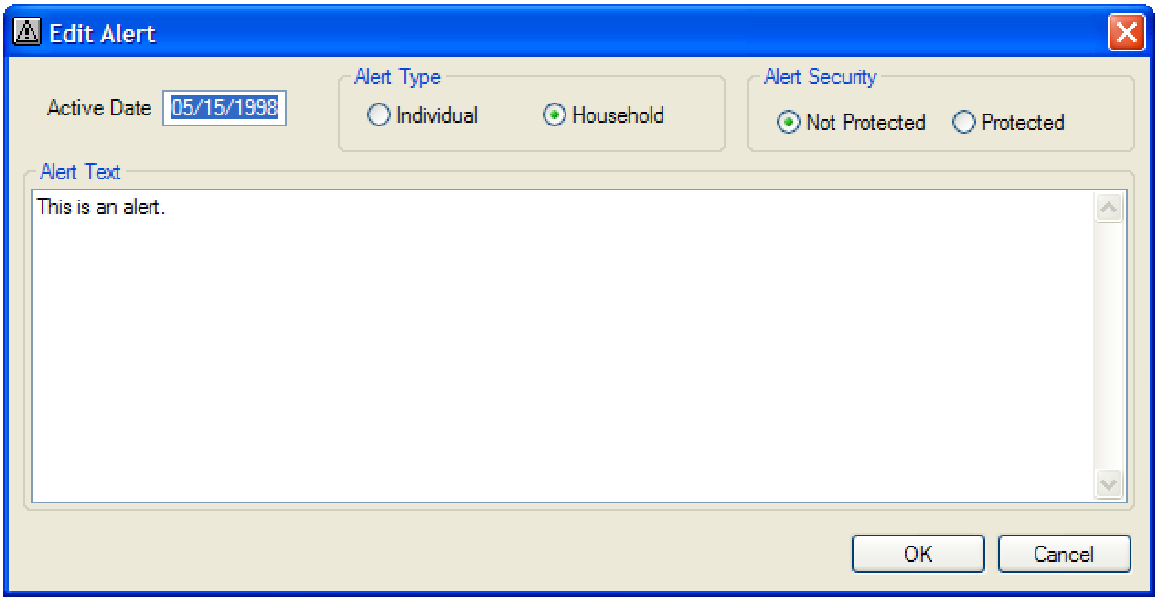


Figure 41 – Edit Alert Dialog

If this dialog was invoked from the Add button of the Alerts List for Household dialog, it is considered to be in Add mode. If the dialog was invoked from the Edit button of the Alerts List for Household dialog, it is considered to be in Edit mode.

9.35.1 Controls

This section describes the behavior of the controls on the Update Alert dialog.

9.35.1.1 Active Date Masked Edit Box

The control allows the user to enter the date on which the alert begins to appear for the household member. The masked edit box is enabled when the Update Alert dialog is active. The masked edit box accepts the entry of numeric digits. The mask for the box is "##/##/####" to accept a date with a four-digit year. If the dialog is in Add mode, the control defaults to the current system date. If the dialog is in Edit mode, the control is populated with the value of the entry selected on the Alerts display grid on the Alerts List for Household dialog.

If an invalid date is entered, a standard error dialog is invoked with the text, "An entry is required for the Active Date."

9.35.1.2 Alert Type Radio Button Group

The control allows the user to indicate whether the alert appears just for the individual member or for all members of the household. The radio button group is enabled when the Update Alert dialog is active. It includes the following radio buttons:

- Individual
- Household

If the dialog is in Add mode, the Household radio button defaults to selected. If the dialog is in Edit mode, the control is populated with the value of the entry selected on the Alerts display grid on the Alerts List for Household dialog.

9.35.1.3 Alert Security Radio Button Group

The control allows the user to indicate that an alert should be protected. A protected alert may only be viewed by a user who has the proper permission to view a protected alert. The radio button group includes the following radio buttons:

- Not Protected
- Protected

The radio button group is enabled when the user has permission to view a protected alert. If the dialog is in Add mode, the Not Protected radio button defaults to selected. If the dialog is in Edit mode, the control is populated with the value of the entry selected on the Alerts display grid on the Alerts List for Household dialog. If the user does not have permission to view a protected alert, the Not Protected radio button is selected and the radio button group is disabled.

9.35.1.4 Alert Text Box

The control allows the user to enter the actual text of the alert. The text box is enabled when the Update Alert dialog is active. If the dialog is in Add mode, it is initially blank. If the dialog is in Edit mode, the control is populated with the value of the entry selected on the Alerts display grid on the Alerts List for Household dialog. When the text exceeds the bounds of the text box, a vertical scroll bar displays.

9.35.1.5 OK Button

The control allows the user to save the alert information and exit the Update Alert dialog. The OK button is enabled when the Update Alert dialog is active. Characteristics for the OK button are defined in the Consistencies chapter.

9.35.1.6 Cancel Button

The control allows the user to discard any changes made to the alert and exit the Update Alert dialog. The Cancel button is enabled when the Update Alert dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

9.35.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Update Alert dialog.

9.35.2.1 Edit for Required Entry in Controls

When the OK button is selected, a check is performed to determine whether values have been entered in the following controls:

- Active Date masked edit box
- Alert Type radio button group
- Alert Security radio button group
- Alert text box

If an entry is not made in an above-listed control, a standard error dialog is invoked with the text, "An entry is required for the {descriptive name of value represented by control}".

9.35.2.2 Edit for Legitimate Values in Controls

Upon successful completion of the above-listed edits, a check is performed to determine whether values entered into the controls are considered legitimate as follows:

- The date value entered in the Active Date masked edit box must be equal to or greater than the current system date.

9.35.2.3 Perform Cross-Edits for Values in Controls

No controls on the Update Alert dialog participate in cross-edits.

9.35.2.4 Save Values

Upon successful completion of the above-listed edits, the system saves the alert information to the database. If the dialog is in Add mode, the system adds a record to the Alerts display grid on the Alerts List dialog. If the dialog is in Edit mode, the system updates the selected record on the Alerts display grid on the Alerts List dialog. The system returns to the Alerts List dialog.

9.36 View Program Abuses

The View Program Abuses dialog allows the user to view and add program abuses for the selected member. The View Program Abuses dialog is invoked when the user selects View Program Abuses menu option on the Participant Folder Activities menu.

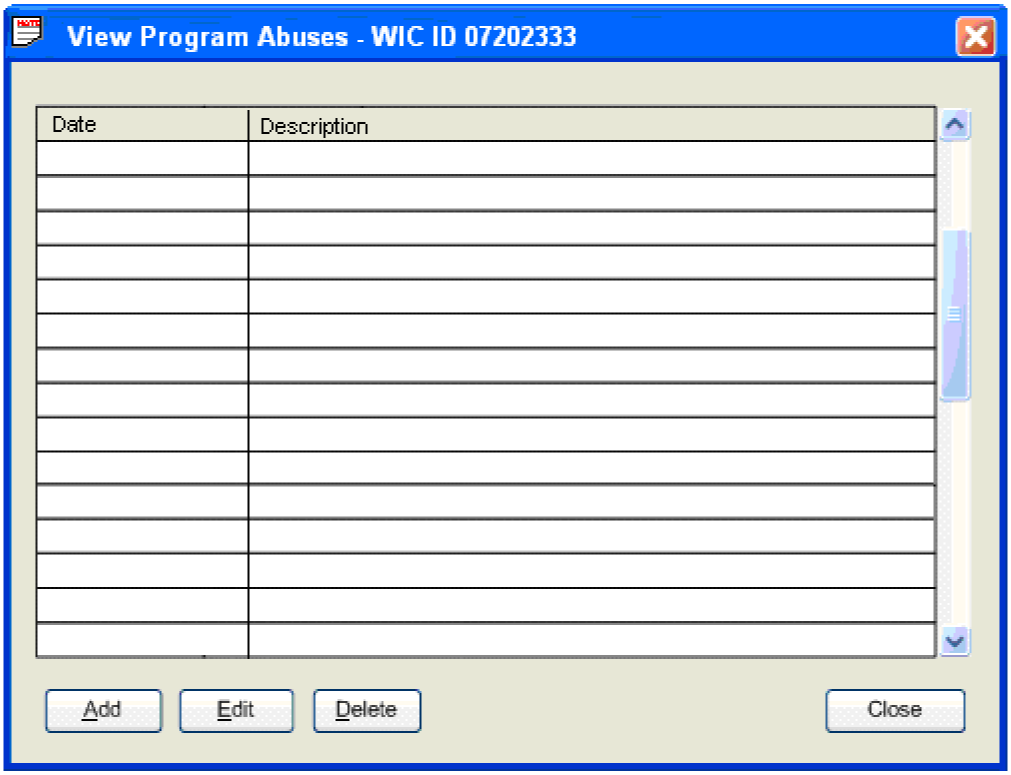


Figure 42 – View Program Abuses Dialog

9.36.1 Controls

This section describes the behavior of the controls on the View Program Abuses dialog.

9.36.1.1 Member's Program Abuses List Grid

The control allows the user to view the member's program abuses. The grid includes the following columns:

- Date
- Abuse Description

The grid includes an entry for each program abuse that was recorded for the participant from the ProgramAbuse table. The entries are sorted in descending order according to the value of the Abuse Date and then ascending order according to the abuse description. The data in the grid is read-only.

9.36.1.2 Add Button

The control allows the user to add an abuse for the selected member. The Add button is enabled when the View Program Abuses dialog is active. Its mnemonic is "A".

When the button is selected, the permissions of the logged-on user are checked. If the user does not have the appropriate permissions (Participant.Add or .FullControl) to add an abuse for the member, a standard error dialog is invoked with the text, "You do not have the necessary permissions to add an abuse. Please see the supervisor."

9.36.1.3 Edit Button

The control allows the user to update information about the abuse selected on the abuse display grid. The Edit button is enabled when an abuse is selected on the abuse display grid. It has mnemonic of "E".

When the button is selected, the permissions of the logged-on user are checked. If the user does not have the appropriate permissions (participant.FullControl) to edit an abuse for the member, a standard error dialog is invoked with the text, "You do not have the necessary permissions to edit an abuse. Please see the supervisor."

9.36.1.4 Delete Button

The control allows the user to delete the abuse selected on the abuse display grid. The Delete button is enabled when an abuse is selected on the abuse display grid. Its mnemonic is "D".

When the button is selected, the permissions of the logged-on user are checked. If the user does not have the appropriate permissions (Participant.FullControl) to delete an abuse for the member, a standard error dialog is invoked with the text, "You do not have the necessary permissions to delete an abuse. Please see the supervisor."

9.36.1.5 Close Button

The control allows the user to exit the View Program Abuses List for dialog. The Close button is enabled when the abuse List for dialog is active. Characteristics for the Close button are defined in the Consistencies chapter.

9.36.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the View Program Abuses List for dialog.

9.36.2.1 Initializing the Interface

Upon initial display of the dialog, the following occurs:

- The title bar text is set to "View Program Abuses".
- The Program Abuses grid displays abuses for the selected member if the user has the appropriate permissions. The permissions of the logged-on user are checked. If the user does not have the appropriate permissions to Participant.View, .Add, or .FullControl then permission is denied.

9.36.2.2 Add Abuse

When the Add button is selected, the Update Abuse dialog is invoked in Add mode.

9.36.2.3 Edit Abuse

When the Edit button is selected, the Edit Abuse dialog is invoked in Edit mode.

9.36.2.4 Delete Abuse

When the Delete Abuse button is selected, a standard confirmation dialog is invoked with the text, "Are you sure you want to delete this abuse?" Yes and No buttons are available. If the user selects Yes, the system deletes the abuse selected on the Abuse display grid and update the contents of the grid. If the user selects No, the user is returned to the View Program Abuses dialog without deleting the abuse.

9.36.2.5 Close Button

When the Close button is selected, the system closes the View Program Abuses dialog and return to the calling window.

9.37 Update Abuse

The Update Abuse dialog allows the user to add an abuse to a member, or edit the abuse selected on the Abuse display grid of the View Program Abuses dialog. The Update Abuse dialog is invoked in response to the following user actions:

- Selection of the Add button on the View Program Abuses dialog defined in this document.
- Selection of the Edit button on the View Program Abuses dialog defined in this document.

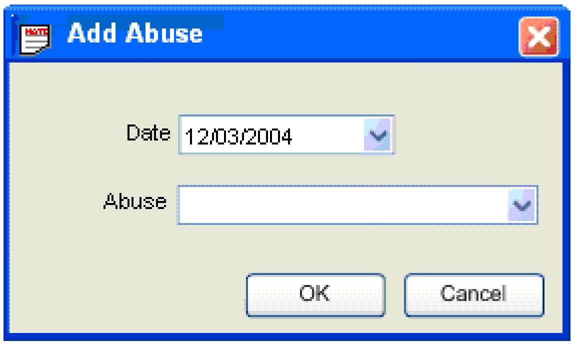


Figure 43 – Add Abuse Dialog

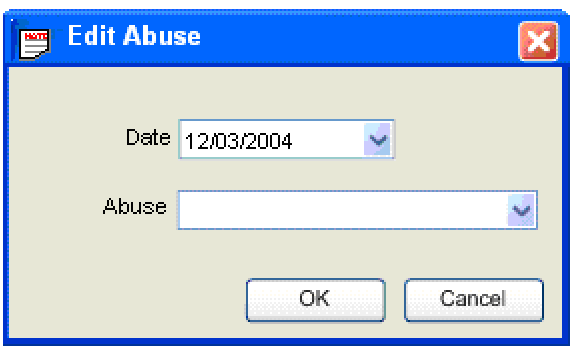


Figure 44 – Edit Abuse Dialog

If this dialog was invoked from the Add button of the View Program Abuses dialog, it is considered to be in Add mode. If the dialog was invoked from the Edit button of the View Program Abuses dialog, it is considered to be in Edit mode.

9.37.1 Controls

This section describes the behavior of the controls on the Update Abuse dialog.

9.37.1.1 Date Control Box

The control allows the user to enter the date on which the program abuse was incurred by the member. The date control is enabled when the Update Abuse dialog is active. The control accepts the entry of numeric digits. The mask for the box is "##/##/####" to accept a date with a four-digit year. If the dialog is in Add mode, the control defaults to the current system date. If the dialog is in Edit mode, the control is populated with the value of the entry selected on the Abuse display grid on the View Program Abuses dialog.

9.37.1.2 Abuse Drop-down List

The control allows the user to select the abuse. The control is enabled when the Update Abuse dialog is active. If the dialog is in Add mode, it is initially blank. If the dialog is in Edit mode, the control is populated with the value of the entry selected on the Abuse display grid on the View Program Abuses dialog. It is loaded with the descriptions from the ReferenceDictionary for "WICPGMABUSE".

9.37.1.3 OK Button

The control allows the user to save the abuse information and exit the Update Abuse dialog. The OK button is enabled when the Update Abuse dialog is active. Characteristics for the OK button are defined in the Consistencies chapter.

9.37.1.4 Cancel Button

The control allows the user to discard any changes made to the abuse and exit the Update Abuse dialog. The Cancel button is enabled when the Update Abuse dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

9.37.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Update Abuse dialog.

9.37.2.1 Edit for Required Entry in Controls

When the OK button is selected, a check is performed to determine whether values have been entered in the following controls:

- Date control box

If an entry is not made in an above-listed control, a standard error dialog is invoked with the text, "An entry is required for the {descriptive name of value represented by control}".

- Abuse drop-down list

If a selection is not made in an above-listed control, a standard error dialog is invoked with the text, "A selection is required for the {descriptive name of value represented by control}".

9.37.2.2 Edit for Legitimate Values in Controls

Upon successful completion of the above-listed edits, a check is performed to determine whether the values entered into the controls are considered legitimate as follows:

- The date value entered in the Date masked edit box must be equal to or greater than the current system date.

9.37.2.3 Perform Cross-Edits for Values in Controls

No controls on the Update Abuse dialog participate in cross-edits.

9.37.2.4 Save Values

Upon successful completion of the above-listed edits, the system saves the abuse information to the database. If the dialog is in Add mode, the system adds a record to the Abuse display grid on the View Program Abuse dialog. If the dialog is in Edit mode, the system updates the selected record on the Abuse display grid on the View Program Abuse dialog. The system returns to the View Program Abuse dialog.

9.37.2.5 Data Map

Control Label	Table	Attribute	Business Rule
	ProgramAbuse	StateWICID	
Date	ProgramAbuse	AbuseDate	
Abuse	ProgramAbuse	AbuseCd	

9.38 Certification Details

The Certification Details dialog allows the user to view the details of a previous certification period for a participant. It is invoked when the user selects the Show Details button on the Certification History tab.

Figure 45 – Certification Details Dialog

9.38.1 Controls

This section describes the behavior of the controls on the dialog.

9.38.1.1 Staff Member Text Label and Value

The control allows the user to view the name of the staff member whose signature was recorded at the end of the certification process. It displays in the inverse color of the form. Note that this control does not receive focus and is not included in the tab order of this dialog.

9.38.1.2 Staff Signature Text Label and Value

The control allows the user to view the electronic signature of the staff member as it was recorded at the end of the certification process. Note that this control does not receive focus and is not included in the tab order of this dialog.

9.38.1.3 Status Text Label and Value

The control allows the user to view the WIC stat us of the participant at the time of certification. It displays in the inverse color of the form. Note that this control does not receive focus and is not included in the tab order of this dialog.

9.38.1.4 Start Date Text Label and Value

The control allows the user to view date on which the certification period began. It displays in the inverse color of the form. Note that this control does not receive focus and is not included in the tab order of this dialog.

9.38.1.5 End Date Text Label and Value

The control allows the user to view date on which the certification period ended. It displays in the inverse color of the form. Note that this control does not receive focus and is not included in the tab order of this dialog.

9.38.1.6 Close Button

The control allows the user to exit the dialog and return to the Certification History tab. The Close button is enabled when the dialog is active. Characteristics for the Close button are defined in the Consistencies chapter.

9.38.2 Processes

No additional processes are defined for this dialog.

9.39 EBT Card History

The EBT Card History dialog allows the user to view the card issuance history for a household. It is invoked when the user selects the View EBT Card History menu option on the Benefit Management menu in the Participant Folder.

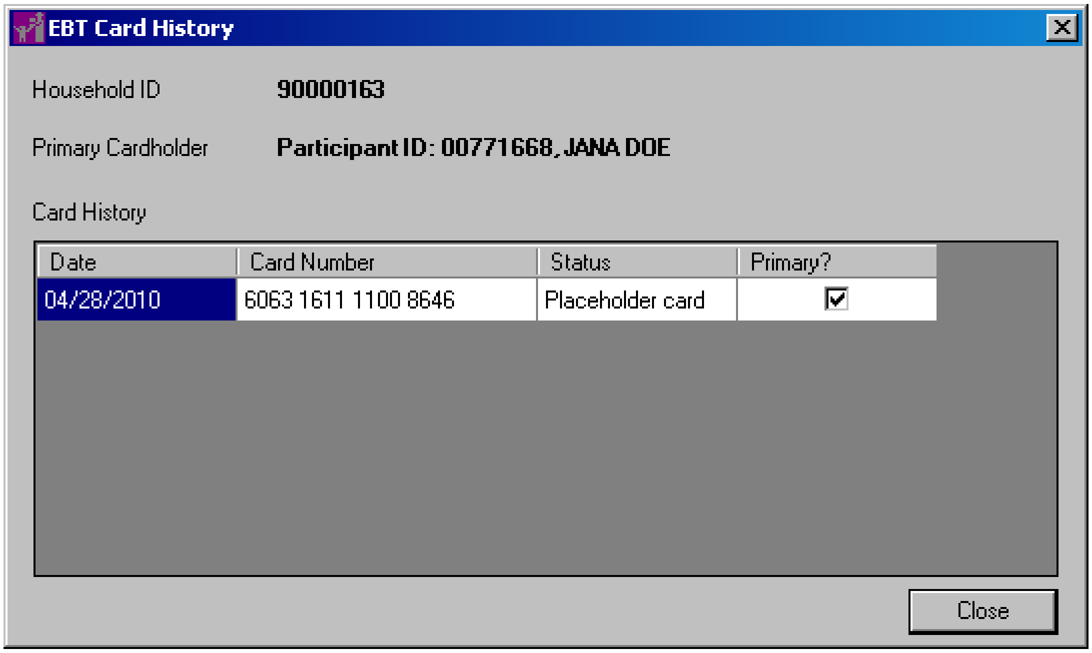


Figure 46 – EBT Card History Dialog

9.39.1 Controls

This section describes the behavior of the controls on the dialog.

9.39.1.1 Household ID Text Label and Value

The control allows the user to view the current household ID number for the household.

9.39.1.2 Primary Cardholder Text Label and Value

The control allows the user to view the participant ID and name of the primary cardholder for the household.

9.39.1.3 Card History Display Grid

The control allows the user to view the card issuance history for the household. The display grid contains a row for each EBT card recorded for the household. The display grid consists of the following columns:

- Date
- Card Number

- Status
- Primary?

9.39.1.4 Close Button

The control allows the user to exit the dialog and return to the Participant Folder. The Close button is enabled when the dialog is active. Characteristics for the Close button are defined in the Consistencies chapter.

9.39.2 Processes

9.39.2.1 Initializing the Interface

Upon initial display of the dialog, the following occurs:

- The title is "EBT Card History".
- The Card History display grid shows all EBT cards that have been issued to all participants within the household.

9.39.2.2 Close

When the Close button is selected, the system will dismiss the dialog and return to the Participant Folder.

9.40 EBT Transaction History

The EBT Transaction History dialog allows the user to view the history of EBT transactions for a household. It is invoked when the user selects the View EBT Transaction History menu option on the Benefit Management menu in the Participant Folder.

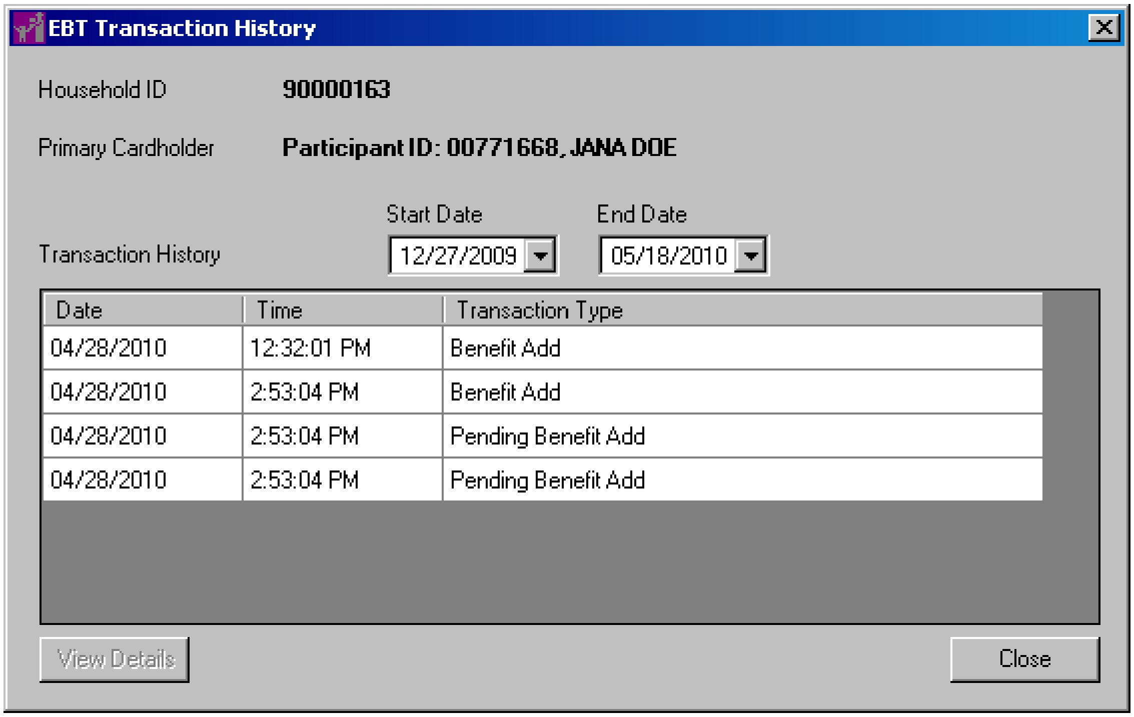


Figure 47 – EBT Transaction History Dialog

9.40.1 Controls

This section describes the behavior of the controls on the dialog.

9.40.1.1 Household ID Text Label and Value

The control allows the user to view the current household ID number for the household.

9.40.1.2 Primary Cardholder Text Label and Value

The control allows the user to view the participant ID and name of the primary cardholder for the household.

9.40.1.3 Start Date Calendar Control (From)

The Start Date calendar control allows the user to specify the start date of the date range for which to display EBT transaction data. The control is enabled when the dialog is active. The default date displayed is the first day of the current month for the current year.

The characteristics for calendar controls are defined in the Consistencies chapter.

9.40.1.4 End Date Calendar Control (To)

The End Date calendar control allows the user to specify the end date of the date range for which to display EBT transaction data. The control is enabled when the dialog is active. The default date displayed is the current system date.

The characteristics for calendar controls are defined in the Consistencies chapter.

9.40.1.5 Transaction History Display Grid

The control allows the user to view a filtered list of EBT transaction history for the household. The display grid contains a row for each EBT transaction that occurred within the date range specified in the Start Date and End Date calendar controls. The display grid consists of the following columns:

- Date
- Time
- Transaction Type

9.40.1.6 View Details Button

The control allows the user to view detailed transaction information for the EBT transaction currently selected in the Transaction History display grid. The button is enabled when an EBT transaction record is selected in the Transaction History display grid.

9.40.1.7 Close Button

The control allows the user to exit the dialog and return to the Participant Folder. The Close button is enabled when the dialog is active. Characteristics for the Close button are defined in the Consistencies chapter.

9.40.2 Processes

9.40.2.1 Initializing the Interface

Upon initial display of the dialog, the following occurs:

- The title is "EBT Transaction History".
- The Start Date calendar control defaults to the first day of the current month for the current year.
- The End Date calendar control defaults to the current system date.
- The Transaction History display grid shows all EBT transaction data that occurred within the date range specified in the Start Date and End Date calendar controls.

9.40.2.2 Edits

The date entered in the Start Date calendar control must represent a valid date in the format of MM/DD/CCYY. If an invalid date is entered, the system will automatically restore the date to the previously entered value.

The date entered in the End Date calendar control must represent a valid date in the format of MM/DD/CCYY. If an invalid date is entered, the system will automatically restore the date to the previously entered value

9.40.2.3 Refresh the Data in the Transaction History Display Grid

When a different date is selected in either the Start Date or End Date calendar controls, the system will refresh the data displayed in the Transaction History display grid to show transactions that occurred within the date range specified.

9.40.2.4 View EBT Transaction Details

When the View Details button is selected, the system will invoke the EBT Transaction History Details dialog described in section 9.41 of this document.

9.40.2.5 Close

When the Close button is selected, the system will dismiss the dialog and return to the Participant Folder.

9.41 EBT Transaction History Detail

The EBT Transaction History Detail dialog allows the user to view the details of an historical EBT transaction for a household. It is invoked when the user selects the View Details button on the EBT Transaction History dialog in the Participant Folder.

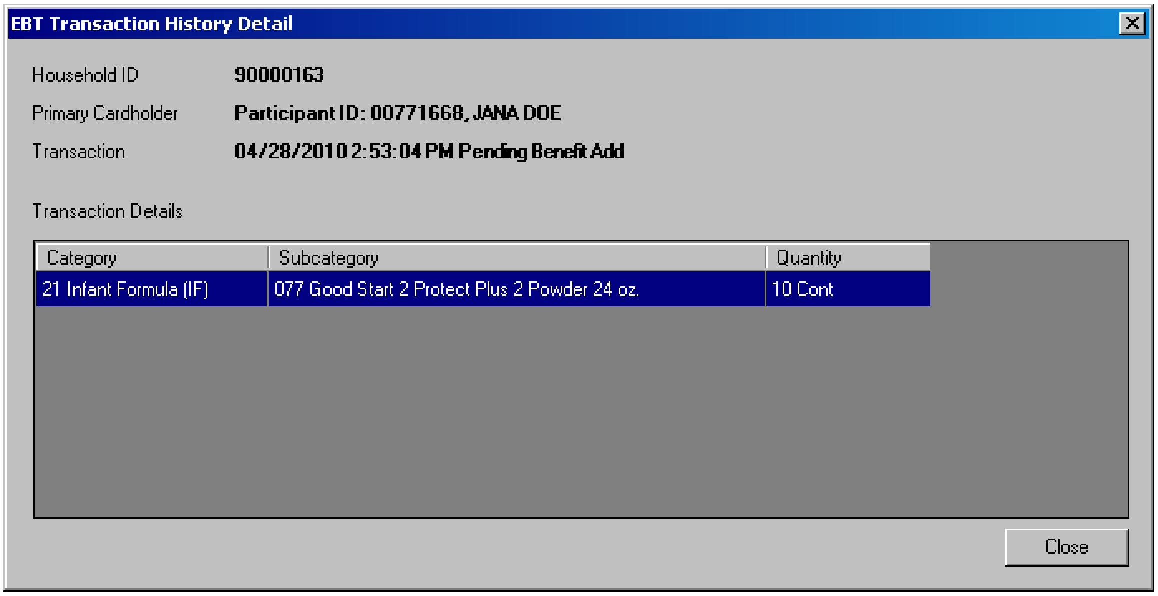


Figure 48 – EBT Transaction History Details Dialog

9.41.1 Controls

This section describes the behavior of the controls on the dialog.

9.41.1.1 Household ID Text Label and Value

The control allows the user to view the current household ID number for the household.

9.41.1.2 Primary Cardholder Text Label and Value

The control allows the user to view the participant ID and name of the primary cardholder for the household.

9.41.1.3 Transaction Text Label and Value

The control allows the user to view the date and time on which the transaction occurred and a brief description of the transaction.

9.41.1.4 Transaction Details Display Grid

The control allows the user to view detailed transaction information, including the category, subcategory, and quantity of food items received. The display grid contains a row for each food item on the transaction. The display grid consists of the following columns:

- Category
- Subcategory
- Quantity

9.41.1.5 Close Button

The control allows the user to exit the dialog and return to the EBT Transaction History dialog. The Close button is enabled when the dialog is active. Characteristics for the Close button are defined in the Consistencies chapter.

9.41.2 Processes

9.41.2.1 Initializing the Interface

Upon initial display of the dialog, the following occurs:

- The title is "EBT Transaction History Detail".
- The Transaction Details display grid shows all food items on the EBT transaction.

9.41.2.2 Close

When the Close button is selected, the system will dismiss the dialog and return to the EBT Transaction History dialog.

9.42 Food Adjustment Wizard

The Food Adjustment Wizard dialog allows the user to make benefit adjustments for the household. It is invoked when the user selects the Food Adjustment Wizard menu option on the Benefit Management menu in the Participant Folder.

NOTE: Prior to opening the Food Adjustment Wizard dialog, SPIRIT will check to make sure an infant's breastfeeding amount has been verified for today. If the breastfeeding amount hasn't been verified, the Health Information tab of the Participant Folder displays and allows the user to verify the breastfeeding status. This check only happens for infants who are fully and partially breastfed.

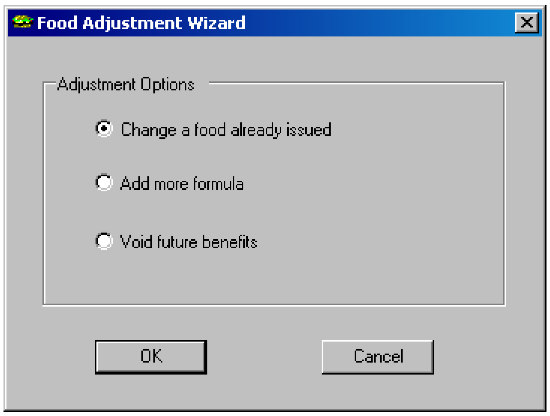


Figure 49 – Food Adjustment Wizard Dialog

9.42.1 Controls

This section describes the behavior of the controls on the dialog.

9.42.1.1 Adjustment Options Radio Button Group

The control allows the selection of a benefit to adjust for the household. It is enabled when the dialog is active. It includes the following options:

- Change a Food Already Issued
- Add More Formula
- Void Future Benefits

The Change a Food Already Issued radio button is the default selection. A selection is required in this control.

9.42.1.1.1 Change a Food Already Issued Radio Button

The control is enabled when the dialog is active. It provides the availability to change a food item that has already been issued for a household.

9.42.1.1.2 Add More Formula Radio Button

The control is enabled when the dialog is active. It provides the ability to add more formula food items to the benefit package for a household.

9.42.1.1.3 Void Future Benefits Radio Button

The control is enabled when the dialog is active. It provides the ability to void benefits that have been issued in the future for a household.

9.42.1.2 OK Button

The OK button is enabled when the dialog is active. Characteristics for the OK button are defined in the Consistencies chapter.

9.42.1.3 Cancel Button

The Cancel button is enabled when the dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

9.42.2 Processes

9.42.2.1 Initializing the Interface

Upon initial display of the dialog, the following occurs:

- The title is "Food Item Wizard".
- The Change a Food Already Issued radio button is selected as the default.

9.42.2.2 OK

When the OK button is selected, the system will launch one of the following processes based on the current radio button selection in the Adjustment Options radio button group:

9.42.2.2.1 Change a Food Already Issued

When the Change a Food Already Issued radio button is selected in the Adjustment Options radio button group and the OK command button is clicked, the system will invoke the Food Category dialog described in section 9.42.2.3 of this document.

9.42.2.2.2 Add More Formula

When the Add More Formula radio button is selected in the Adjustment Options radio button group and the OK command button is clicked, the system will invoke the Add Formula dialog described in section 9.48 of this document.

9.42.2.2.3 Void Future Benefits

When the Void Future Benefits radio button is selected in the Adjustment Options radio button group and the OK command button is clicked, the system will invoke the Identify Benefits to Void dialog described in Clinic Chapter 11 - Food Instrument Production.

9.42.2.3 Cancel

When the Cancel button is selected, the system will dismiss the Food Adjustment Wizard dialog and return to the Participant Folder.

9.43 Food Category

The Food Category dialog allows the user to change a food category for a food item that has already been issued to the household. It is invoked when the user selects the Change a Food Already Issued radio button and clicks the OK button on the Food Adjustment Wizard dialog in the Participant Folder.

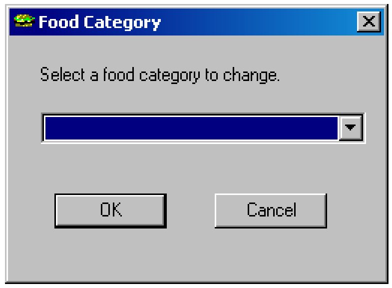


Figure 50 – Food Category Dialog

9.43.1 Controls

This section describes the behavior of the controls on the dialog.

9.43.1.1 Select a Food Category to Change Drop-down List

The control allows the user to select the type of food to change. The drop-down list is enabled when the dialog is active. The drop-down list includes a list of valid food categories from the reference dictionary table of the lookup database. It is initially blank.

9.43.1.2 OK Button

The OK button is enabled when the dialog is active. Characteristics for the OK button are defined in the Consistencies chapter.

9.43.1.3 Cancel Button

The Cancel button is enabled when the dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

9.43.2 Processes

9.43.2.1 Initializing the Interface

Upon initial display of the dialog, the following occurs:

- The title is "Food Category".
- The Select a Food Category to Change drop-down list is blank as the default.

9.43.2.2 OK

When the OK button is selected, the system will launch the Change Food Issued dialog described in section 9.44 of this document.

9.43.2.3 Cancel

When the Cancel button is selected, the system will dismiss the Food Category dialog and return to the Food Item Wizard dialog.

9.44 Change Food Issued

The Change Food Issued dialog allows the user to change a food item that has already been issued to the household. It is invoked when the user selects a non-formula food category in the Select a Food Category to Change drop-down list and selects the OK button on the Food Category dialog in the Participant Folder.

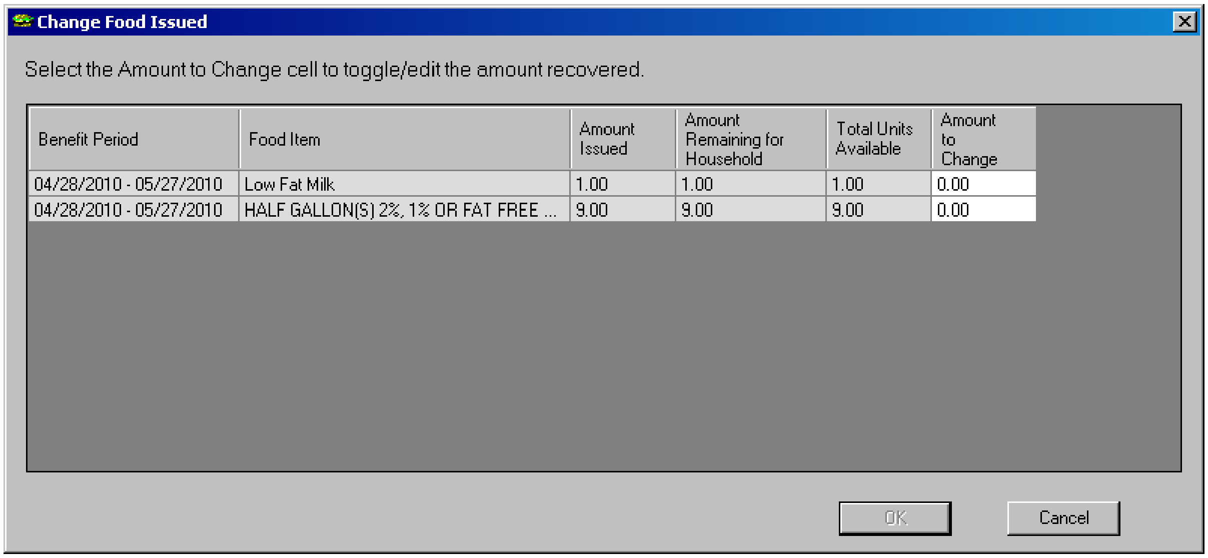


Figure 51 – Change Food Issued Dialog

9.44.1 Controls

This section describes the behavior of the controls on the dialog.

9.44.1.1 Food Items Display Grid

The control allows the user to view the food items that were issued to the household. The display grid is enabled when the dialog is active. It includes the following columns:

- Benefit Period
- Food Item
- Amount Issued
- Amount Remaining for Household
- Total Units Available
- Amount to Change

An entry is added to the grid for each food item that was issued. The user can enter or update data directly in the Amount to Change column to replace a food item in the household food package. If 0 units are available to be issued, then changes made to the Amount to Change column are automatically discarded. The other values in the grid are read-only.

9.44.1.2 OK Button

The OK button is enabled when the dialog is active. Characteristics for the OK button are defined in the Consistencies chapter.

9.44.1.3 Cancel Button

The Cancel button is enabled when the dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

9.44.2 Processes

9.44.2.1 Initializing the Interface

Upon initial display of the dialog, the following occurs:

- The title is "Change Food Issued".
- The Food Items display grid contains a row for each food item currently issued to the household.

9.44.2.2 OK

When the OK button is selected, the system will launch the replacement Food dialog described in section 9.45 of this document.

9.44.2.3 Cancel

When the Cancel button is selected, the system will dismiss the Change Food Issued dialog and return to the Food Category dialog.

When Cancel is clicked, if changes have been made in the Amount to Change column of the Food Items display grid that have not been saved, the system will display a message with the text: "There are changes to save. Are you sure you want to close without saving?" If the user selects Yes, the dialog is cancelled, the changes are discarded, and the user is returned to the Food Category dialog. If the user selects No, the user is returned to the Change Food Issued dialog.

9.45 Replacement Food

The Replacement Food dialog allows the user to replace a food item. It is invoked when the user selects the OK button on the Change Food Issued dialog in the Participant Folder.

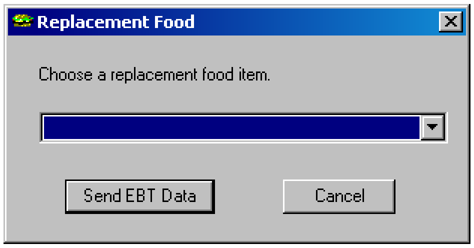


Figure 52 – Replacement Food Dialog

9.45.1 Controls

This section describes the behavior of the controls on the dialog.

9.45.1.1 Choose a Replacement Food Item Drop-down List

The control allows the user to select the replacement food item. The drop-down list is enabled when the dialog is active. The drop-down list includes a list of valid food items from the reference dictionary table of the lookup database. It is initially blank.

9.45.1.2 Send EBT Data Button

The control allows the user to negotiate a connection with the online EBT system, execute the transaction, and then save the data changes to the SPIRIT database upon success. It is enabled when the dialog is active and valid changes have been made in the Cans to Issue column of the Formula Items display grid. It will be disabled once the control is clicked.

9.45.1.3 Cancel Button

The Cancel button is enabled when the dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

9.45.2 Processes

9.45.2.1 Initializing the Interface

Upon initial display of the dialog, the following occurs:

- The title is "Replacement Food".

- The Choose a Replacement Food Item drop-down list is blank as the default.

9.45.2.2 Send EBT Household Demographics Data

When the Send EBT Data button is selected, the following processes are started:

9.45.2.2.1 Verify Required Information

A check is performed to ensure required information is provided:

- No values are considered required.

9.45.2.2.2 Verify Legitimate Values

When the above-listed edits are completed successfully, a check is performed to ensure the information provided is legitimate:

- All values are considered legitimate.

9.45.2.2.3 Perform Cross-edits

When the above-listed edits are completed successfully, a check is performed to ensure all cross-edits are met:

- No cross-edits are required.

9.45.2.2.4 Send EBT Data to the J.P. Morgan System

When the above-listed edits are completed successfully, and no errors are found:

- The Send EBT Data button is disabled so that a user cannot activate the request a second time.
- The operation data is collected and a request passed to the SPIRIT Web Service.
- The timeout period is read from the State Business Rules (EBTConnectionTimeout).
- The transaction beings, logging data into the EBT Transaction table in the SPIRIT database. When the process starts, the Status text value is updated to display the progress.
- The SPIRIT Web Service attempts to establish a connection to the online J.P. Morgan system.
- When the process is completed successfully, the EBT household demographic information is saved to the SPIRIT database and the dialog is dismissed.
- If the process is not completed successfully, an error message will display in the Status text. The EBT household demographic information will not be saved to the SPIRIT database.

- Focus is returned to the calling window or dialog.

9.45.2.3 Cancel

When the Cancel button is selected, the system will dismiss the Replacement Food dialog and return to the Change Food Issued dialog.

9.46 Enter Return Quantity

The Enter Return Quantity dialog allows the user to make benefit adjustments for the household. It is invoked when the user selects the Food Adjustment Wizard menu option on the Benefit Management menu in the Participant Folder.

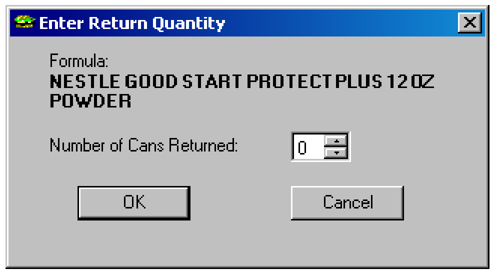


Figure 53 – Enter Return Quantity Dialog

9.46.1 Controls

This section describes the behavior of the controls on the dialog.

9.46.1.1 Number of Cans Returned Spin Button Control

This control allows the user to enter the quantity of the food item to return. The control is when the dialog is active. The value specified must be a positive whole number. The mask of this box is "##". Selection of the increment or decrement buttons of the spin control increases or decreases the value by one (1). The maximum value of the spin button control is set to the maximum amount allowed based on the participants WIC category and age category.

9.46.1.2 OK Button

The OK button is enabled when the dialog is active. Characteristics for the OK button are defined in the Consistencies chapter.

9.46.1.3 Cancel Button

The Cancel button is enabled when the dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

9.46.2 Processes

9.46.2.1 Initializing the Interface

Upon initial display of the dialog, the following occurs:

- The title is "Enter Return Quantity".

- The Number of Cans Returned spin control displays 0 as the default.

9.46.2.2 OK

When the OK button is selected, the system will launch display the Select Formula dialog described in Common Interface Panels Chapter L - Food Prescription.

9.46.2.3 Cancel

When the Cancel button is selected, the system will dismiss the Enter Return Quantity dialog and return to the Replacement Food dialog.

9.47 Formula Replacement

The Formula Replacement dialog allows the user to replace a formula item. It is invoked when the user selects the OK button on the Enter Return Quantity dialog and then selects a new formula for item on the Select Formula dialog in the Participant Folder.

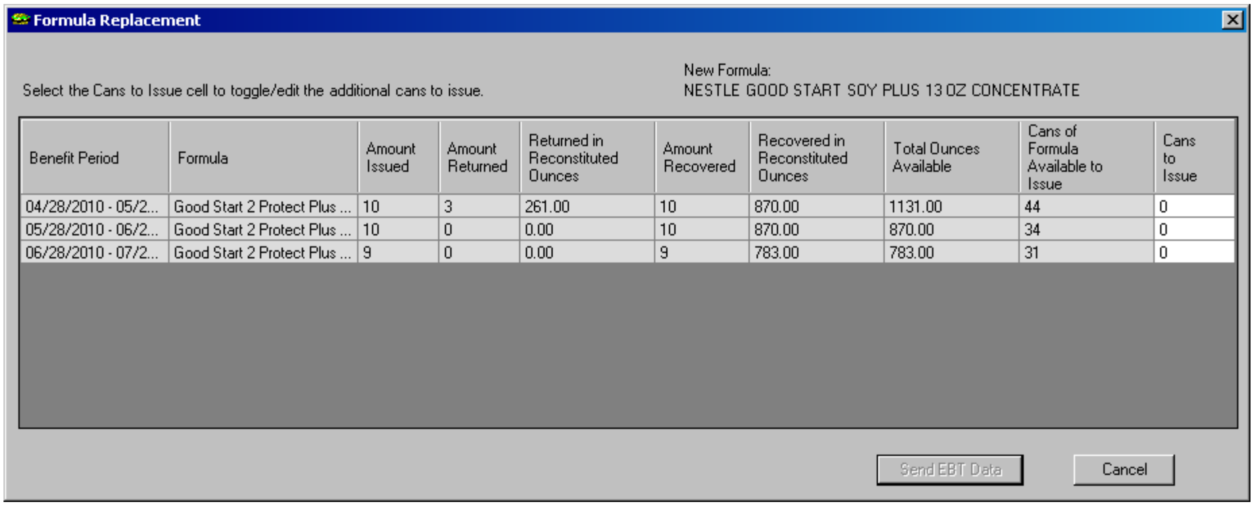


Figure 54 – Formula Replacement Dialog

9.47.1 Controls

This section describes the behavior of the controls on the dialog.

9.47.1.1 New Formula Text Label and Value

The control allows the user to view the name of the new formula to issue for the household food package based on the selection made on the Select Formula dialog described in Common Interface Panels Chapter L - Food Prescription.

9.47.1.2 Formula Items Display Grid

The control allows the user to view the formula items that are available for issuance. The display grid is enabled when the dialog is active. It includes the following columns:

- Benefit Period
- Formula
- Amount Issued
- Amount Returned
- Returned in reconstituted Ounces
- Amount Received

- Recovered in Reconstituted Ounces
- Total Ounces Available
- Cans of Formula Available to Issue
- Cans to Issue

An entry is added to the grid for each formula food item is currently available for issuance. The user can enter or update data directly in the Cans to Issue column to replace formula in the household food package. If 0 cans are available to be issued, then changes made to the Cans to Issue column are automatically discarded. The other values in the grid are read-only.

9.47.1.3 Send EBT Data Button

The control allows the user to negotiate a connection with the online EBT system, execute the transaction, and then save the data changes to the SPIRIT database upon success. It is enabled when the dialog is active and valid changes have been made in the Cans to Issue column of the Formula Items display grid. It will be disabled once the control is clicked.

9.47.1.4 Cancel Button

The Cancel button is enabled when the dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

9.47.2 Processes

9.47.2.1 Initializing the Interface

Upon initial display of the dialog, the following occurs:

- The title is "Formula Replacement".
- The Formula Items display grid will contain an entry for each formula food item is currently available for issuance.

9.47.2.2 Send EBT Household Demographics Data

When the Send EBT Data button is selected, the following processes are started:

9.47.2.2.1 Verify Required Information

A check is performed to ensure required information is provided:

- No values are considered required.

9.47.2.2.2 Verify Legitimate Values

When the above-listed edits are completed successfully, a check is performed to ensure the information provided is legitimate:

- All values are considered legitimate.

9.47.2.2.3 Perform Cross-edits

When the above-listed edits are completed successfully, a check is performed to ensure all cross-edits are met:

- No cross-edits are required.

9.47.2.2.4 Send EBT Data to the J.P. Morgan System

When the above-listed edits are completed successfully, and no errors are found:

- The Send EBT Data button is disabled so that a user cannot activate the request a second time.
- The operation data is collected and a request passed to the SPIRIT Web Service.
- The timeout period is read from the State Business Rules (EBTConnectionTimeout).
- The transaction beings, logging data into the EBT Transaction table in the SPIRIT database. When the process starts, the Status text value is updated to display the progress.
- The SPIRIT Web Service attempts to establish a connection to the online J.P. Morgan system.
- When the process is completed successfully, the EBT household demographic information is saved to the SPIRIT database and the dialog is dismissed.
- If the process is not completed successfully, an error message will display in the Status text. The EBT household demographic information will not be saved to the SPIRIT database.
- Focus is returned to the calling window or dialog.

9.47.2.3 Cancel

When the Cancel button is selected, the system will dismiss the Formula Replacement dialog, cancel the Food Item Wizard entirely, and return to the Participant Folder.

When Cancel is clicked, if changes have been made in the Cans to Issue column of the Food Items display grid that have not been saved, the system will display a message with the text: "There are changes to save. Are you sure you want to close without saving?" If the user selects Yes, the dialog is cancelled, the Food Item Wizard cancels entirely, the changes are discarded, and the user is returned to the Participant Folder. If the user selects No, the user is returned to the Formula Replacement dialog.

9.48 Add Formula

The Add Formula dialog allows the user to view cans of formula issued and to update the issuance as necessary. It is invoked when the user selects the Add More Formula radio button and clicks the OK button on the Food Adjustment Wizard dialog in the Participant Folder.

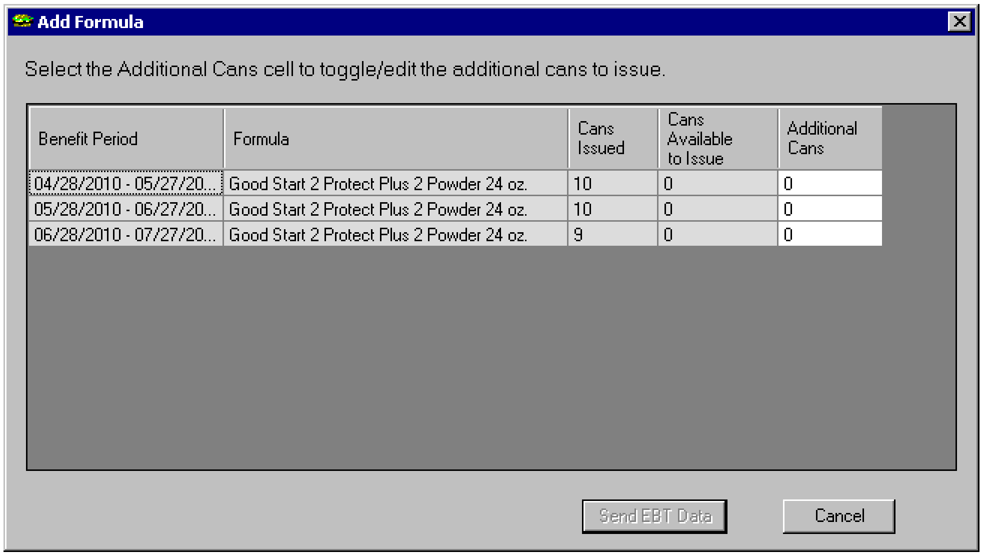


Figure 55 – Add Formula Dialog

9.48.1 Controls

This section describes the behavior of the controls on the dialog.

9.48.1.1 Formula Items Display Grid

The control allows the user to view the formula items that are available for issuance. The display grid is enabled when the dialog is active. It includes the following columns:

- Benefit Period
- Formula
- Cans Issued
- Cans Available to Issue
- Additional Cans

An entry is added to the grid for each formula food item is currently available for issuance. The user can enter or update data directly in the Additional Cans column to add more formula to the household food package. If 0 cans are available to be issued, then changes made to the Additional Cans column are automatically discarded. The other values in the grid are read-only.

9.48.1.2 Send EBT Data Button

The control allows the user to negotiate a connection with the online EBT system, execute the transaction, and then save the data changes to the SPIRIT database upon success. It is enabled when the dialog is active and valid changes have been made in the Additional Cans column of the Formula Items display grid. It will be disabled once the control is clicked.

9.48.1.3 Cancel Button

The Cancel button is enabled when the dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

9.48.2 Processes

9.48.2.1 Initializing the Interface

Upon initial display of the dialog, the following occurs:

- The title is "Add Formula".
- The Formula Items display grid will contain an entry for each formula food item is currently available for issuance.

9.48.2.2 Send EBT Household Demographics Data

When the Send EBT Data button is selected, the following processes are started:

9.48.2.2.1 Verify Required Information

A check is performed to ensure required information is provided:

- No values are considered required.

9.48.2.2.2 Verify Legitimate Values

When the above-listed edits are completed successfully, a check is performed to ensure the information provided is legitimate:

- All values are considered legitimate.

9.48.2.2.3 Perform Cross-edits

When the above-listed edits are completed successfully, a check is performed to ensure all cross-edits are met:

- No cross-edits are required.

9.48.2.2.4 Send EBT Data to the J.P. Morgan System

When the above-listed edits are completed successfully, and no errors are found:

- The Send EBT Data button is disabled so that a user cannot activate the request a second time.
- The operation data is collected and a request passed to the SPIRIT Web Service.
- The timeout period is read from the State Business Rules (EBTConnectionTimeout).
- The transaction beings, logging data into the EBT Transaction table in the SPIRIT database. When the process starts, the Status text value is updated to display the progress.
- The SPIRIT Web Service attempts to establish a connection to the online J.P. Morgan system.
- When the process is completed successfully, the EBT household demographic information is saved to the SPIRIT database and the dialog is dismissed.
- If the process is not completed successfully, an error message will display in the Status text. The EBT household demographic information will not be saved to the SPIRIT database.
- Focus is returned to the calling window or dialog.

9.48.2.3 Cancel

When the Cancel button is selected, the system will dismiss the Add Formula dialog and return to the Food Item Wizard dialog.

When Cancel is clicked, if changes have been made in the Additional Cans column of the Formula Items display grid that have not been saved, the system will display a message with the text: "There are changes to save. Are you sure you want to close without saving?" If the user selects Yes, the dialog is cancelled, the changes are discarded, and the user is returned to the Food Adjustment Wizard dialog. If the user selects No, the user is returned to the Add Formula dialog.